CARE*SEARCH* USER GUIDE CONTENTS

Appendices

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Care*Search* Product Description

CareSearch is a Searchable Database

Care*Search* is a searchable database of care homes, hospitals, hospices and clinics in the UK that are independently owned, and of the organisations, or groups, that operate these establishments. In addition the care standards agencies that inspect and register the establishments, the local authorities that purchase care services, and the primary care trusts (in England) that manage free nursing care, are also included.

These different types of records are all interlinked in the database on the CD. Thus a care record is linked to the group that operates the home, and to local offices of the care standards agency and the local authority; a hospital group is linked to the hospitals that it operates, and so on.

Care*Search is a CD ROM*

Care*Search* is supplied on a CD ROM. ROM stands for read only memory, which means that once the contents of the CD have been set at the production stage they cannot be altered ie. the files on the CD are read-only. ROM also retains its contents when the power is switched off, so that ROM is used for storing data and programs, like Care*Search,* that will be accessed frequently.

Care*Search contains Program Files and Data Files*

The contents on the Care*Search* CD are made up of program files and data files. Like any computer programme the software files have to be loaded, that is installed, onto your PC before you can use the software. The data files however can stay on the CD, or can be installed on your PC, or can be installed on a server. Most users leave the data files on the CD, and keep the CD in the CD drive on their PC, so when they search the records (after opening Care*Search* on their PC), the software looks in the data files on the CD to retrieve the records (which is why the CD has to stay in the CD drive when Care*Search* is being used).

Care*Search comes in Three Versions for both Single Use & Multiple Use*

Three different versions of Care*Search* are available for single use eg. on a stand alone PC, or for multiple use at the same time on a network server:

- The **Basic** version which allows users to browse all the records, but does *not* have a facility to download data.

- the **Enhanced** version which allows *limited* downloading of contact & mailing data, which can then be imported into other applications for mailings

- the **Complete** version, which allows *extended* downloading of data, which can then be imported into other applications eg. to add additional records to your own database, for mailings, for analysis etc

Access to Care*Search* and to the different versions is managed by a password supplied to each user with each issue.

Care*Search is Updated Times a Year*

A new CD is issued three times a year, usually in March/April, June/July, and October/November, and each issue has an expiry date after which the CD will cease to work, or time out (30 days warning is given of the expiry date). Each new issue will contain updated data, but the software may also have been changed to improve the functionality, and to fix any faults. For these reasons, as well as the changes to passwords, users have to reinstall Care*Search* on their PC each time a new issue is released.

Conditions of Use

The use of Care*Search* is subject to a number of conditions, which are set out in a licence agreement that is signed by customers. The main terms of the licence agreement are to assert that Laing & Buisson is the copyright owner of Care*Search*, the data and the software; that the product is for use by customers within their own business only, and that it may not passed to any third party without permission; and that Laing & Buisson has taken all reasonable measures to ensure the accuracy of the data and cannot accept responsibility or liability for errors or omissions.

A specimen licence agreement is reproduced in **Appendix 5.**

Installing Care*Search*

Care*Search* can be installed on a PC or a server for a single user, or on a server for multiple users to access Care*Search* at the same time ie. a network installation, as explained below.

When Care*Search* is installed, files are downloaded to certain areas of the local drive of a PC as listed below. Where there are likely to be restrictions on the downloading of software to these locations, it is recommended that CareSearch is first installed and run by your system administrator or IT department who will be able to allow access. Examples are given in the Troubleshooting appendix at the end of this guide of the various messages that are displayed if CareSearch is installed where there are such restrictions.

Read-Write Access to Local Drives - Technical Information

Read-write access is required to the following areas of a local drive:

(1) C: root directory (this is the location of the PDOXUSRS.NET file)

(2) C:\Program Files\Laing & Buisson\CareSrch (this is the location of the CareSrch.exe, CareSearch.crt, and CareSearch.ini files - this ini file controls global settings - and the Index, Backup and Userdata folders). Access to other folders in Program Files may likewise be required.

(3) C:\Windows or C:\WINNT (this is the location of the CareSrch.ini file, which controls machine specific settings)

Single User Installation on a PC

The installation process takes only a few minutes (the time varies according to the speed of the machine on which it is being installed), and consists largely of clicking on the Next button is successive windows. The individual steps are explained below:

(1) *close* all other Windows applications on your PC, in particular any application using a BDE (Borland Database Engine)

(2) *place* the Care*Search* disc in the CD drive caddy of your PC and *close* it. Wait a short while the AutoPlay is activated and the **Launch/Install** window appears

(3)   If the Launch/Install window does not appear, there are two alternative ways to open Care*Search:*

  ∗   select Run from the Start menu, *use* the Browse button to locate your CD drive (usually the D drive), *double-click* on the drive (this will have the name of the Care*Search* CD eg. CSrchDec04), and then *double-click* on the Autoplay.exe file. The Launch/Install window will appear

  ∗   *open* Windows Explorer (either from your desktop, from Start/Programs or Start/Programs/Accessories depending on your version of Windows), *double-click* on your CD drive, usually the D drive (this will have the name of the Care*Search* CD eg. CSrchDec04), in the left hand pane, and then *double-click* on the Autoplay.exe file in the right hand pane. The Launch/Install window will appear

(4)   The other items in the **Launch/Install** window, in addition to Install Care*Search*, are:

  ∗   *Launch Application*, which you can use to open Care*Search* as an alternative to the desktop icon that will have been placed on your desktop after Care*Search* has been installed

  ∗   *Find us on the Web*, which is a link to Laing & Bussion's web site

  ∗   *Install Acrobat Reader* ®, which is a link from where you can download the Adobe Acrobat software which you will need to view and print off the reports in the Financial Accounts database on Care*Search*

  ∗   *Exit*, which you can use to close down Care*Search*

(5)   *click* on Install Care*Search* in the **Launch/Install** menu. The next screen takes a little time to appear, so don't click on Install Care*Search* again, otherwise two copies of the installation screen will open, one hidden behind the other, and this will prevent you, when you are almost at the end of the installation process, from completing it. If this happens, close both windows and re-start the installation process.

The **Launch/Install** window also asks you to close all existing Windows applications. This is because some applications may conflict with the installation process, in particular those that use a Borland Database Engine (or BDE).

After a short wait, a blue Wise Installation screen will display, followed by a notice 'Checking for previously installed components'. This check may take a little time. The 'Welcome to Care*Search* CD Version 2.0 Set Up program' window will then display.

(6)   *click* on Next. The **Download Option** window will display.

(7)   *enter* the first four digits of your eight-digit password in the first field, *press* Tab, and *enter* the last four digits in the second field.

(8)   The password supplied to subscribers varies according to which of the three versions of Care*Search* has been purchased; the Basic version with browsing only, the Enhanced version with limited downloading, and the Complete version with extended downloading, and also varies according to whether the version is for single use or is to be networked

(9)   *click* on Next. If you have not entered your password correctly, a message will appear to say this. Otherwise the **Registration Information** window will display.

(10)   *enter* your name in the Name field and the name of your organisation in the Company field, and *click* on Next. A further **Registration Information** window will display confirming the names just entered

(11)   *click* on Next. The **Destination Location** window will display. The Care*Search* software will install by default to C:\Program Files\Laing_Buisson\CareSrch (or to the location to which it was installed previously if this was different). To change this location, click on Browse and select another folder. This is also the default location of the Userdata folder to which searches, stored lists, and exported data files are saved, and where the temporary tables that are produced by a search are stored.

(12)   *click* on Next. The **Backup Replaced Files** window will display. As any existing Care*Search* files are overwritten during the installation, this facility creates a back up of

the data files that will be replaced. This is a standard feature of a software installation

By default these files will be backed up to C:\Program Files\Laing_Buisson\CareSrch\ BackUp. No action is therefore necessary unless you do not want to back up any existing files.

(13)   *click* on Next. The **Select Components** window will display. You should *tick* either the Index Files box or the Data Files box.

If you tick the Index Files, the index files will be installed onto your hard drive. This will speed searches and improve performance, but only a small amount of disc space will be used.

If you wish to improve performance even more, you should *tick* the Data Files box , and all the data files will be installed onto your hard drive. Unlike the index files, which take up around 16Mb of a space, a figure is not given for the size of the data files, but it is approximately 380Mb.

Note that if you check the Data Files box, you do not need to check the Index Files box as well, though it will do no harm if you do.

If you have checked the Index Files box, and *click* on Next, the next window to display is the Select Program Manager Group window.

If you have checked the Data Files box, and *click* on Next, the next window to display is the Data Location window, and after that the Select Program Manager Group window**.**

(14)   The **Data Location** window. The default location given for the data files is C:\ and the files will be put in folders CareSrch\Data ie. C:\CareSrch\Data. The folders are created as part of the installation, unless there are folders with these names already there. To change this location, click on Browse and select another folder. Do not install the data files in a sub-directory such as C:\Program Files\Laing_Buisson\CareSrch as they will be used by the program. Either way, *click* on Next

(15)   The **Select Program Manager Group** window. Here you can select or enter the name under which you want Care*Search* to be listed under Programs in the Start menu. The default name is currently 'Care*Search* CD Version 2.0', but you can overwrite this with 'Care*Search*' if you prefer.

(16)   *click* on Next. The **Start Installation** window will display. You can use the Back button to return to any of the previous windows to change any of the details you have entered or options you have selected

(17)   *click* on Next. The **Installing** window will display. The upper section, Current Files, shows the names and the location of the files as they are successively downloaded onto the local drive. The lower section, All Files, shows the time left to complete the installation.

If you have ticked the Index Files box, the downloading and installation takes no more than a minute.

If you have ticked the Data Files, box, the downloading takes a few minues more, and the progress bar will appear stuck near the end whilst the data files are downloaded. The time taken depends on the speed of the processor and the amount of RAM installed on a PC.

Again, as explained above, you may not be able to complete the installation if you have another application open that conflicts with the installation process, in particular those that use a Borland Database Engine (or BDE), and a message will appear to inform you of this. If this happens, close both windows and re-start the installation process.

(18)   once all the files have been loaded, the Installing window closes automatically, and another window appears to say that the CD has been successfully installed. Click on Finish to close the window and exit from installation.

(19)   The installation will have placed a Care*Search* icon on your desktop. Double-click on the icon to open Care*Search*.

Single User Installation on a Server

Care*Search* can also be installed to a server for a single user, but only one person will be able to use the CD at a time as a network password is needed for Care*Search* to be used by more

than one person at a time.

To install a single user version of Care*Search* on a server, follow the instructions for Network Installation below.

Network Installation

Care*Search* can be installed to a server for a single user or for multiple users depending on the version of Care*Search* that has been supplied. For the single user versions, only one person will be able to use the CD at a time, whereas for networking versions, several people ie. multiple users, can use Care*Search* at the same time.

(a) Network Server

CareSearch is installed on a network by first mapping a network drive from a PC that has a CD drive to a directory on a server (ie. a drive on the PC points to a folder on the server), and copying the data files from the CD to the server. A network directory folder therefore needs to be available to store the Care*Search* information. Then the other PCs that will form part of the network are mapped to the same drive. If the other PCs don't have CD drives, all the files on the CD have to be copied to the server.

You can choose to use an existing directory on your server or you may create a new directory. As a folder called CareSrch will be placed in this directory by the installation process, if you create a new directory you should use a different name to avoid confusion. You may have to ask your network administrator to do this for you.

(b) PC on which you wish to install Care*Search* to a server	(c) Subsequent PCs
Map a network drive to the new directory as follows: • *open* Windows Explorer, and from the Menu bar, *select* Tools/Map Network Drive. The Map Network Drive window will display • in the Drive field, *select* any unused drive letter eg. 'Z:' • in the Path field, *enter* the path to the directory on the server that you have selected or created, or use the Browse button. The path might be something like \\Server\Laing. *Note: Avoid the use of* Care*Search or similar after \\Server\ as the install creates a sub-directory called CareSrch and this could cause confusion.* • Once this has been entered for a first time, you will not have to enter the path again, as it will appear in the drop down list in the Path field • *tick* the Reconnect at Logon box underneath and then *click* OK	As for **First PC**
• *place* the Care*Search* disc in the CD drive caddy of your PC, and go through the steps of the **Single Use Installation on a PC** as above, until	• *place* the Care*Search* disc in the CD drive caddy of your PC, and go through the steps of the **Stand-Alone PC Installation**, as above, until you get to

you get to the **Select Components** window, where you should check the 'Data Files' box	the **Select Components** window, where you can check the 'Index Files' box, but do *not* check the 'Data Files' box.
• It is not necessary to tick the 'Index Files' box, but it is a good idea to do so as this assists the speed of searches	• *click* Next and continue through the steps of the **Stand-Alone PC Installation**
• *click* on Next. The **Data Location** window will display which refers to network installation. The window repeats the requirement that a network drive mapped to a top level directory must be selected for Care*Search* to work over the network, otherwise the Care*Search* data files will install by default to C:\Program Files\Laing_ Buisson\CareSrch\Data	*Note: The **Data Location** window does not display*
	Note: If the other PCs do not have a CD drive, the whole of the CD has to be copied to a network drive in (b), and the other PCs will have to see that drive as the source CD
• *click* on Browse on the Destination Folder, and in the Select Data Directory window that opens, *select* from the drop list of drives at the bottom of the window, the Care*Search* network drive that has just been created or has previously been created.	
• remove from the path at the top of the Select Data Directory window, any path information that appears by default after the drive letter eg. Z:\ , and then *click* OK.	
click Next and continue through the steps of the **Single Use Installation on a PC** as above.	
Note: The installation progress bar will stop short of completion for a while because the transfer of data files from the CD onto the server takes some time.	
Note: If the other PCs that are to be networked do not have a CD drive, the whole of the CD has to be copied to a network drive, and the other PCs will have to see that drive as the source CD	
When installation is complete, *remove* the Care*Search* disc from the CD drive caddy of the PC	When installation is complete you MUST *remove* the Care*Search* disc from the CD drive caddy of the PC. If you don't you won't be prompted to take the next, essential step.
Check that network installation has been successful by *clicking* on the CareSearch icon on the desktop, and then when CareSearch has opened, *select* Settings, then Preferences. The CD drive field should show CareSearch as mapped to the chosen network drive.	• *double-click* on the Care*Search* icon which the installation will have placed on your desktop, to launch Care*Search*
	• if a box appears asking you to 'Ensure that the Care*Search* CD ROM is loaded into the correct drive', *select* from the drop down list of drives, the path to the Care*Search* data directory, which has been created on the server. This will be something like Z:\\Server\CareSrch. Having done this once, the PC will remember the selected path the next

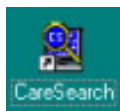|	time you launch Care*Search*
Close Care*Search* before going to the stage (c) ie. installing CareSearch on the next PC	Close Care*Search* each time before going on to install Care*Search* on any further CDs

(d) PC Settings

Change the BDE Administrator settings on each PC as follows:

‣ *select* Start/Settings/Control Panel and *double-click* on BDE Administrator

‣ in the BDE Administrator window; *select* the Configuration tab and *double-click* on Configuration; *double-click* on Drivers, *double-click* on Native, and *double-click* on Paradox

‣ in the right hand pane, change the NET DIR setting to the networked directory that must be the same for all users. This must be done for each PC that needs to access the data as otherwise users will get a locked file error message when attempting to use the CD

‣ click off the NET DIR line to update the setting, close the BDE Administrator, and click Save to save the change in the settings

If the NET DIR points to the wrong directory or to a non-accessible directory, you will get a 'Path not found' or a 'Network Initialisation Failed. Permission denied' error message when you attempt to launch Care*Search.*

Launching Care*Search*

During installation, a Care*Search* icon will have been placed on your desktop, which is a shortcut to Care*Search.*

Double-click on the shortcut in order to launch Care*Search.* Whilst the Care*Search* CD remains in the CD drive, the **Launch/Install** window will not display again, but a screen will display briefly to say that Care*Search* is loading.
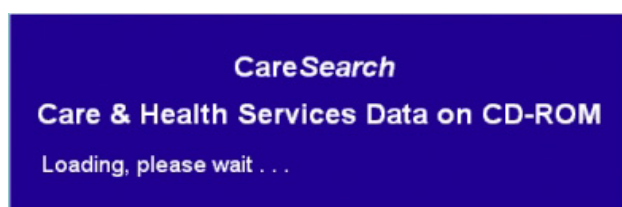
The Care*Search, or* **Home** screen will then display.

If at any time you *eject* the disc from the CD drive (this applies to non-network users), and then *insert* it again, the **Launch/Install** window will display after a short time (about 20 seconds). You can then *select* Launch Application to launch Care*Search*

Other Methods of Launching Care*Search*

Alternatively, you can launch Care*Search* by selecting 'Care*Search'* from the list of programmes in Start/Programs. The Care*Search* **Home** screen will display. If you prefer this, you can delete the Care*Search* shortcut icon from your desktop

The **Launch/Install** window will, for non-network users, also display if you:

• *select* Run from the Start menu, *use* the Browse button to locate your CD drive, *double-click* on the drive, and then *double-click* on the Autoplay.exe file, *or*

• *open* Windows Explorer, *double-click* on your CD drive in the left hand pane, and then *double-click* on the Autoplay.exe file in the right hand pane

How to Get the Best Out of Care*Search*

Care Placement

For organisations involved in care & health placement such as social services care contracting units, NHS Trusts, voluntary placement agencies, care providers, Care*Search* offers an extensive database of linked records, and a wide range of placement tools :

- care homes, hospitals, hospices and clinics across the UK can be located within a variable mileage radius of any postcode, by district local authority, county or unitary authority, and by region eg. to find a home close to a relative

- care homes can be searched for by weekly fees, client type, numbers of beds, numbers of single rooms and ensuite rooms, the specialist care provided, key services and facilities, cultural/ethnic environment, languages spoken, and many other criteria eg. to find homes offering care for a particular condition, or homes costing no more than a certain amount

- care home records also give the name of the person dealing with admissions, where there is a separate person from the manager or proprietor. Where the home is owned by a care home group, the group record may also give the name of the admissions manager

- links on care home and hospital records to the local care standards office to check registration; in England, to the inspection reports on each care home via the CSCI web site; to care home and hospital group records; to the local care contracting office, and, again in England, to the local primary care trust

- searches can be saved, search results can be saved as stored lists and edited, records can be marked, users can enter their own data in 'user flag' fields, instant reports printed, data can be exported quickly, with field names included, for use in-house

- full details of key contracting staff in every purchasing authority, their baseline fees, and the staff dealing with free nursing care (in PCTs in England), and of the 89 local offices of care standards agencies in the UK

Special Interest Groups

For charities and voluntary bodies who provide advice to people and organisations eg. via information help lines, about where care and treatment for particular conditions can be found, Care*Search* offers a speedy and comprehensive database of records of suitable establishments, with a variety of search tools:

- care homes, hospitals, hospices and clinics across the UK can be searched for by specialist care provided, key services and facilities, cultural/ethnic environment, languages spoken, weekly fees, client type, numbers of beds, numbers of single rooms and ensuite rooms, and many other criteria

- care homes can be located within a variable mileage radius of any postcode, by district local authority, county or unitary authority, and by region

- care home records also give the name of the person dealing with admissions, where there is a separate person from the manager or proprietor. Where the home is owned by a care home group, the group record may also give the name of the admissions manager

- care home records have links to the local care standards office; in England, to the inspection reports on each care home via the CSCI web site; to the local care contracting office and details of their baseline fees; and, in England, to the local primary care trust and the staff dealing with free nursing care

Healthcare Research and Care Provision Analysis

For anyone interested in researching the healthcare market, the Department of Health, market analysts, care providers, universities, healthcare consultants, Care*Search* offers comprehensive and accurate data:

- on total numbers of care homes, care homes with nursing, hospitals, hospices and clinics,

and the total beds/places, owned by every provider in the care and health industry

- on the breakdown of ownership by sector (private, voluntary, local government, and NHS private patient units), client type treated/cared for, weekly fee levels, size of establishment, location, and other selectors, including fast reports that allow users to calculate care home capacity (homes and beds by sector) using geographical and other selectors, and to assess demand

- searches can be saved, search results can be saved as stored lists and edited, records can be marked, users can enter their own data in 'user flag' fields, instant reports printed, data can be exported quickly, with field names included, for use in-house

Direct Marketing

For direct marketing and sales campaigns by any business selling products and services in the care and health sector, Care*Search*:

- allows marketing activities to be tailored to budgets and timetables, mailings and sales campaigns to be precisely targeted, decision makers to be identified, market size to be investigated

- has a database of over 50,000 contacts and 35,000 organisations and establishments, including over 6,000 senior managers in care home and hospital groups, and independent hospitals and clinics throughout the UK, including managing directors, purchasing managers, business development directors, operations directors, training directors,

- enables care homes, hospitals, hospices and clinics across the UK to be located within a variable mileage radius of any postcode, by postcode ranges, local authority district, county or unitary authority, geographical county, and region. In fact every possible geographical selector is provided

- also allows establishments to be simultaneously searched by client type, size, ownership by groups or individuals, specialist care, key services and facilities, and many other criteria

- searches can be saved, search results can be saved as stored lists and edited, records can be marked, users can enter their own data in 'user flag' fields, instant reports printed

- data can be exported quickly, with field names included, for mailing and other marketing activities, with options for contact name and salutations

Healthcare Business Planning & Investment

For care home groups, healthcare providers, property managers, insurers, investors in healthcare, lending institutions, business consultancies and anyone else looking to invest and expand in the care and health sector, Care*Search* provides:

- a comprehensive breakdown of ownership by individual provider, by ownership sector ('for profit' or 'not for profit', size of establishment, client type treated/cared for, weekly fee levels, and by location, allowing users to identify competitors, calculate care home capacity - homes and beds by sector- using fast reports, and to assess demand

- care homes, hospitals, hospices and clinics across the UK can be located within a variable mileage radius of any postcode, by district local authority, county or unitary authority, by region, to analyse distribution and identify opportunities

- details of all provider and group head offices, including over 3,000 senior managers, including managing directors, business development directors, finance directors, company chairpersons

- a database of 29,000 registered care homes, hospitals, hospices and clinics in the UK, with data on bed/places, owner, date first registered, purpose-built or not, numbers of single, shared and ensuite rooms

- searches can be saved, search results can be saved as stored lists and edited, records can be marked, users can enter their own data in 'user flag' fields, data can be exported quickly, with field names included, for in-house analysis and planning

Investigation & Enforcement

For government agencies concerned with revenue and benefits:

- care homes, hospitals, hospices and clinics across the UK can be located within a variable mileage radius of any postcode, by district local authority, county or unitary authority, by region, to locate taxpayers for tax assessment purposes, and claimants who are resident in nursing homes and care homes whose entitlement to benefits may be affected.

Recruitment

For recruitment consultants and employment agencies:

- care homes, hospitals, hospices and clinics across the UK can be located within a variable mileage radius of any postcode, and by size (number of beds) and registration type (care home with nursing, care home only)

- potential clients with recruitment needs can be identified, and candidates can be matched to vacancies

Care*Search* Home Page and the Databases

The Care*Search* Home Page displays the eight databases that are currently available:
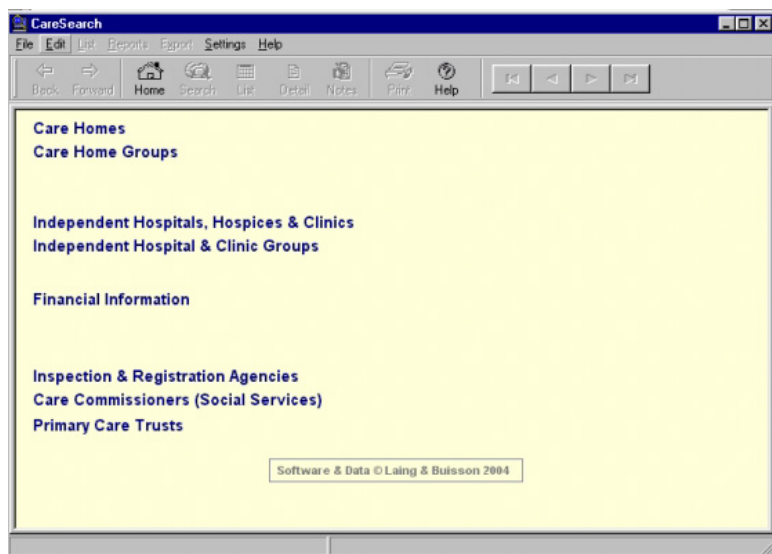
Home Page

- Care Homes - 21,700 plus care homes, care homes with nursing, care homes not providing medicine or medical treatment, including homes owned by local authorities and NHS trusts, and independent (ie. non-NHS) hospitals providing non-acute care such as medium stay physical or psychiatric rehabilitation

- Care Home Groups - 1,080 for-profit and not-for-profit operators of 3 or more care homes, including local authorities and NHS trusts

- Hospitals, Hospices and Clinics - 2,845 independent healthcare establishments including NHS private patient units (PPUs) and NHS hospitals with pay beds listed on insurer networks, plus care homes providing rehabilitation programmes

- Hospital and Clinic Groups - 150 private and voluntary operators of 2 or more hospitals, hospices or clinics, including independent sector treatment centre (ISTCs) groups

- Financial Information - the financial accounts of 290 major operators in the care and health sector

- Inspection & Registration Agencies - 27 local offices of the care standards agencies for England, Scotland and Wales, and the registration authorities in Northern Ireland

- Care Commissioners (Social Services) - 211 care commissioning and contracting units in local authority social services departments

- Primary Care Trusts & Health Boards - 150 primary care trusts (PCTs) in England, and 40 health boards or trusts in Scotland, Wales and Northern Ireland.

Records Not Included

As information about adult placement homes and children's homes are not in the public domain, these homes are not included in the Care Homes Database.

Sheltered housing and supported living homes, which are not required to be registered with care standards agencies, are also not included in the Care Homes Database.

How are records linked to each other?

Every care home, hospital, hospice and clinic record i.e. every establishment, is linked to the record of their local care commissioner (the social services care contracting unit), their local registration and inspection office (care standards agency), and in England to their local

primary care trust. Every establishment is also linked to a record of their care home group or hospital group (if any).

In addition, for searching by location, every care home, hospital, hospice and clinic is linked to a county or unitary local authority, and to a region, and in England to their local district or borough council.

Selecting a Database

As the mouse cursor is moved over each database the text changes from blue to red. To select a database, click once on the database name. The Care*Search* **Search Form** screen for the database will display.

Menu Bar and Toolbar

The menu bar at the top of the screen shows the *File*, *List*, *Reports*, *Export*, *Settings*, and *Help* drop-down menus. The different options available in these menus are explained later in this guide.

The toolbar underneath the menu bar shows the Back, Forward, Home, Search, List, Detail, Notes, Print, and Help icons/buttons, plus a Record Navigation bar. The menus and icons will be greyed out according to the screen currently displayed.
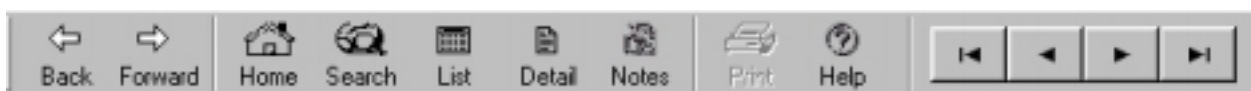
Toolbar

The **Back** and **Forward** icons act in the same way as in a web browser. The Back button if active, takes you back to the screen that was displayed immediately before the present one, and the Forward button takes you on to the screen that was displayed immediately after the present one.

The **Home** icon takes you to the **Care*Search* Home** screen, which lists the currently available databases you may search.

The **Search** icon takes you to the **Search Form** screen and displays the current or last used search entered.

The **List** icon runs the current search entered in the **Search Form** and displays the results in the **Summary List** screen.

The **Detail** icon displays the **Record Detail** of the first or currently selected record in the summary list.

The **Notes** icon takes you to the User Flags and Notes associated with the first or currently selected record in the summary list, and allows you to edit these flags and notes.

The **Print** icon is only active when the Summary List or Record Detail screens are showing, and prints the contents of those screens.

The **Help** icon provides help notes appropriate to the window currently displayed.

The **Record Navigation** bar at the end of the Toolbar is only active when the Record Detail screen is displayed. The centre arrows allow you to move forward and backward one record at a time through the records selected by a search in alphabetical order. The end barred arrows take you to the first and last record in the records selected by a search.

Search Form and Search Techniques

The Search Form enables you to enter criteria to select particular records in the different databases, and there are common methods for searching each of the databases.

In the Care*Search* **Home** screen, click once on Care Homes. It will take you into the **Search Form, which** enables you to search the Care Homes database.

Search Form - Care Homes Database

Search Fields & Changing Fields

Each database will have a different series of rows of searchable fields, up to a maximum of eight depending on the database. A **field** contains specific types of information common to every record. In the case of the care homes database for instance, there will be a field in each record giving the number of beds or places in each home, a field containing the postcode for each home, and so on.

The number of fields that are available to search on varies from one database to another. The Care Homes, and the Hospitals, Hospices and Clinic databases have the largest number of fields, which as well as address and contact fields, include data fields specific to the type of establishment, as well the different types of links that there are to other organisations.

A complete list of all the searchable fields for each database is given in Appendix 1 Searchable & Exportable Fields

Default Searchable Fields

A default set of searchable fields are displayed on the left hand side of the Search Form. These are the fields that are likely to be the most frequently used. In the case of the Care Homes database, the default fields are:

Home Name   Beds/Places, Numbers of
Registration Type   Location - please select
Primary Client Type   *(from a drop down list of fields)*
Services/Facilities   Select another field
Specialist Care

and in the case of the Hospitals, Hospices and Clinic database, the default fields are:

Establishment Name	Beds, Numbers of
Establishment Type	Location - please select
Patient Type	*(from a drop down list of fields)*
Owner Name	Select another field
Services/Facilities	

The 'Select another field' at the end, is a spare search field to enable users to select another field without having to change any of the default fields.

Changing Fields

The default fields can be changed to ones of your own choice by clicking on the (magnifying glass) button to the right of the field names, and selecting another from the fields in the drop down list. A search field can be selected more than once ie. it appears twice in the searchable fields, which can be useful when different search terms have to be used (see Entering Criteria below)

Field Descriptions

Further information about the searchable fields in the Care Homes database, and about the fields in all the other databases on Care*Search*, are listed in alphabetical order in Appendix 3 Field Descriptions & Notes.

Finding the Records and Refining your Search

Once your search terms have been entered, as explained below, click on the Find icon above the search fields, or press Enter, to search for the required records. If no records are retrieved, check your search criteria and modify/refine them as necessary.

You may wish to broaden your search criteria by amending the search fields. There are a number of options you can use if you want to refine an existing search strategy:

- *highlight* and *press* Delete to delete any single search value you want to remove. Reducing the number of search values will, in most cases, retrieve more records

- *click* on the Clear button above the search fields in the Search Form if you want to clear all the search values in the search criteria entry boxes, but retaining the search fields to enter different search values

- *click* on the red Reset button if you want to clear all search values and return to the eight default search fields to start a new search.

Reset and Clear buttons

The inactive Reset button, which appears on the left hand side of the Search Form above the field names, turns red and becomes active when a search term is entered into any of the search fields. *Clicking* on this button will remove any search criteria and return all search fields to the default fields.

To remove the search terms that have been entered, without returning the search fields back to the default settings, *click* on the Clear icon.

Field Descriptions & Notes

The Help button at the right hand end of each search row provides information, in most cases, about the specific field currently selected for that row. An appendix at the end of this User Guide includes all the field notes in the current issue of Care*Search*.

AND, OR, and NOT Operators

The button for the AND, OR, and NOT logical (or Boolean) operators are found to the left of each search field. The button defaults to AND, but you can change it to OR or NOT by *clicking* on the button.

and Using AND as the operator in different fields means that you will find records that meet *all* the search criteria that you have entered	For example, selecting Care Homes with Nursing in the Registration Type field of the Care Homes database, and <400 in the Nursing Care Maximum Single Room Fee field, will select all care homes with nursing, *and* for those same homes, where the maximum weekly fee for nursing care in a single room is less than £400
or Using OR as the operator in different fields means you will find records that meet one or other of the criteria entered	For example, entering >31/12/2000 in the First Registration Date field of the Care Homes database, and selecting Yes in the Purpose Built field with the OR operator, will select all care homes that are purpose built *or* have been first registered since 1 January 2001. As the number of occasions when the OR operator is useful is much less than those in which you can use AND, AND is the default operator
not Using NOT as the operator means that you will exclude from the search results, the records that match the search criteria you have entered. The NOT operator cannot be used to exclude values where there are multiple values in a field for the same record eg. Client Type, Services, Specialist Care in the Care Homes database. The Primary Client Type is however OK as there is only one value for each care home record.	For example, you could find all homes NOT operated by a Care Home Group within the boundaries of Coventry City Council as follows: ∗ in the Local Authority by County/Unitary Authority search row, *click* on the … (ellipsis) button to the right of the search box to display an index of all council names in alphabetical order. Select Coventry City Council by *double-clicking* on the name ∗ *click* on the … button to the right of any field you do not want to use in your search and select Care Home Group from the alphabetical list of fields displayed. ∗ *click* on the AND operator to the left of Care Home Group until it turns into NOT ∗ *enter* * (a wild card) in the search box to the right of Care Home Group Note that if you do not enter the wild card, the Find will simply ignore the field and the NOT operator will have no effect ∗ *click* on Find to return a Summary List of homes within the boundaries of Coventry City Council that are not owned or managed by a Care Home Group. Another example: entering Edinburgh in the Town field of the Care Homes database, with the NOT operator, and selecting Scotland in the Region field with the AND operator, will select all care homes in Scotland, except those in Edinburgh.

Entering Criteria

You may enter criteria in the white search box to the right of the field names in any one or more of the rows, for as many fields as there are in the Search Form (the number of search fields varies from one database to another). The criteria you can enter depends on the type of field.

The simplest and commonest way to enter a search term is to click on the ▣ (ellipsis) button at the right hand of the search box to display a list, the **index**, of all the values available for that field (see **Index Page** below).

Alternatively, you can enter your own search terms and search operators as explained in the table and notes below. Note that operators are entered without spaces either side.

Field Type	*Search Operators*	*Examples*
Text Fields Home Name, Address 1, Town, Special Client Information, Notes, User Flags	*Wild Cards* ***** (asterisk) **%** (percentage) *Multiple Search Terms* Also see **|** (vertical bar) for multiple search terms below	Some fields with text may not have an index so you can use wild cards to search for letters or words Use ***** or **%** to substitute for multiple characters in text eg. entering Lond* or Lond% in the search box for the Town field will find records in London, London Colney and Londonderry. Entering smok* in the Special Client Information search box would select SMOKER, SMOKERS and SMOKING.
		Use two ***** to search for a word or part of a word in the field eg. entering *Poplars* in the name will produce all the care homes with Poplars in any part of its name. *Poplars*Home* can also be used
		The ***** wild card will also work in the fields where there is multiple data for a record eg. the Client Type, Specialist Care, and Services/Facilities fields in the Care Homes database, but not with the NOT operator
	Wild Cards **?** (question mark) **_** (underscore)	Use **?** or **_** to substitute for single characters in text eg. entering Londo? in the search box for the Town field will return homes in London only; for searching in the Notes field
Numeric Fields Fees, Bed Numbers, Day Places, Room Numbers	*Comparison Operators* **<** (less than) **>** (greater than) **<>** (not equal to) **<=** (less than or equal to) **>=** (greater than or equal to) (but **=<** does not work) *Range Operator* **-** (hyphen) *Multiple Search Terms* Also see **|** (vertical bar) for multiple search terms below	You can enter a single figure in the search box, but you will only find records just for this figure. If you want to specify a range of figures, as is more likely, you can use comparison operators: <50 is less than 50 >100 is greater than 100 <>20 is not equal to 20 <=150 is less than or equal to You can also specify a range of figures by using **-** (hyphen), as in 320-400. There is no need to enter a £ sign when searching on the fee or charges fields.
Date Fields Currency Date of Fee Information,	*Comparison Operators* Same as for Numeric fields *Multiple Search Terms*	Date fields can be searched using **<**, **>** and **=**, but an 8 digit format should be used eg. >31/03/2003. You cannot use the **-** (hyphen) range

First Registration Date	Also see **|** (vertical bar) for multiple search terms below	operator in date fields.
Postcode Field	*Wild Cards* ***** (asterisk) **%** (percentage) *Range Operator* **..** (double period) *Multiple Search Terms* Also see **|** (vertical bar) for multiple search terms below	In the postcode field, you can use a wild card eg. LD*, which searches for all records with postcodes in the Llandrindod Wells postcode area. You can also use **..** to search on a range of postcodes eg. G1..12, will search for all records with Glasgow postcodes in the range G1 to G12. Note that this search can be entered as G1..12, or G1..G12.

Multiple Search Terms

Multiple search terms can be entered in the same search box by separating them with a **|** (vertical bar or pipe - the upper character on the backslash key) eg.

- >49|<101 will select care homes, hospitals etc with bed numbers between 50 and 100 inclusive
- >31/03/1999|<01/04/2003 will select care homes first registered between April 1999 and March 2003 inclusive
- CW5*|SY4* will select records with postcodes beginning with CW5 and SY4.

In numeric fields, you can use a comparison operator, with a range operator in the same field eg. <500|800-1000, though this is an unlikely search strategy.

Of more use, is to include for postcode searches, a range search and a search with a wild card at the same time eg. EH*|G1..45 selects all records with an Edinburgh postcode, and records with Glasgow postcodes beginning G1 through to G45. However these terms have to be entered in a particular way, so it is preferable to enter the search terms in two separate Postcode fields as below:

AND   Postcode   EH*

OR   Postcode   G1..45

Excluding Records Within a Set

If you want to exclude certain records from a set eg. you want to exclude particular postcode districts from a postcode area with many districts, you can avoid having to enter numerous criteria by selecting a field twice and eliminating the unwanted records using the second field eg. to select all records in the Gloucester except those in GL5 and GL6, you should enter:

AND   Postcode   GL*

NOT   Postcode   GL5*|GL6*

Index Page, Summary List and Record Detail

Index Page

Many fields have index tables as indicated by the ▦ (ellipsis) button at the right hand of the search box on the Search Page. Clicking on this button opens the Index Page for the selected field.

The left hand side of the Index Page displays a list or index of all the current values in alphabetical order for all the data in the field, together with the number of records for each value. There are no other values in this field apart from what you see in this index
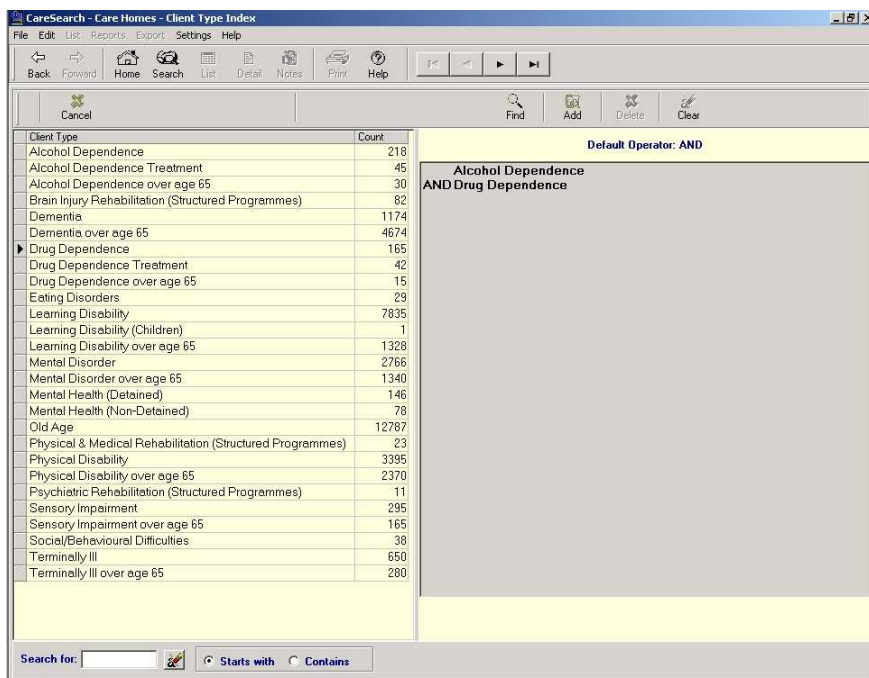
Index Page - Care Homes Client Type Field - Using the AND Operator

The right hand side displays the values you select from the index on the left hand side. From here you can select multiple values, see what records are selected using those values, and refine the search results by adding or deleting values. Using the Client Type field in the Care Homes database as an example:

- *double-click* on a Client Type value to select it eg. Drug Dependence. The value selected appears in the right hand pane. You can select more than one value

- *double-click on* Alcohol Dependence. The client type appears below Drug Dependence, with an OR to the left

- The OR is the default operator, as shown above the right hand window, and it is the default because if you are interested in which care homes provide for particular clients, it is usually a question of wanting to know the homes that provide for one or more of those clients, rather than the homes that provide for all of the client types selected in which case you would use AND

- when you have selected you chosen values from the index, you can either click on the Add button which takes you to the Search Form, with the values you just have chosen added to the relevant search field, or you can click on Find to see the results of the search in the Summary List without returning to the Search Form

- you can add or delete values from the right hand pane, using Add or Delete

- you can change the default operator to AND by clicking on OR in fields where there are multiple values for each record i.e. a care home can provide care for a number of different client types, so if you click on the words 'Default

Operator' it changes to AND. You can now search for care homes that provide care for both Alcohol Dependence and Drug Dependence

Summary List

Having entered your search criteria, click on the Find icon or the List icon, or press Enter to display the search results. The search results will appear as a Summary List of records, in this case care home records (see illustration below).

Summary List - Care Homes

You can either scroll up or down the summary list, or use the navigation keys in the middle of the toolbar to move through the records. The navigation keys ⏮ ◀ ▶ ⏭ are useful if you want to move through the records one by one, or go straight to the last record, or back to the first record quickly.

When the summary list is first opened, the first record has a black arrow ▶ at the beginning of the record indicating that this record is the current record. If you were to click on the Detail icon on the toolbar, the full details of this record will display in the Record Detail Page (see Record Detail below). You can move the black arrow up and down the summary list using the ⬆ or ⬇ keys or the navigation bar.

When a record is selected with the mouse, the entire record is in highlighted in black. These highlighted records can also be marked for display and printing purposes. See Marking Records in Summary Lists below

Sorting Summary List

The search results will be displayed in alphabetical order by the name of the care home, hospital, group etc. The records in the summary list can be sorted in ascending or descending order on any of the columns, which are named at the top.

The default column or field names are Name of Establishment, Town, Postcode, Places, Registration Type (in Care Homes) or Establishment Type (in Hospitals, Hospices & Clinics), and Telephone Number

- *click* once on the field name at the top of a column to sort the records in ascending order.

  The more records there are, the longer it will take to sort. Where the number of records is over 1000, this will take a relatively longer time to sort and a window prompt will appear

letting you know that the sorting process will be slow and lets you decide whether you wish to pursue.

When the records have sorted, a small chevron sign, pointing upwards, appears at the top of the column that has been sorted, indicating that the records have been sorted in ascending order. The illustration below shows the chevron in the Town field after the records have been sorted in ascending order.

Town	Post Code	Places
Alnwick	NE66 2PN	52
Ambleside	LA22 0JQ	25
Appleby in Westmorland	CA16 6HN	21
Arnside	LA5 0AW	34
Ashington	NE63 9LJ	59
Auckland	DL14 9DL	48
Barnard Castle	DL12 8EX	32
Barrow in Furness	LA14 4HE	23

- *click* a second time on the field name to sort the field again. The chevron sign points downwards to indicate that the records are now sorted in descending order

- once a summary list has been sorted a first time, the records will sort very quickly, whatever column is selected to sort records on

Marking Records in Summary Lists

Records can be marked to allow records to be filtered for display and printing using the Mark and View options in List on the menu bar.

Marked records have an asterisk (*) on the left hand side of the record, and will be highlighted (either with the default colour of light blue or another colour that has been selected in Settings/Preferences using the 'Marked Colour' option). The highlight can be toggled on and off by selecting List/Highlight On in the menu bar.

There are several ways of marking and unmarking records in the summary list:

- successively *right clicking* a selected record in a summary list will mark or unmark the record

- successively *pressing* the Space bar will also mark or unmark a selected record

- *pressing* and *holding* the Shift key, and *selecting* the first and last record of a group of records, will select a consecutive group of records. Then *selecting* the List/Marked option in the menu bar will mark the records. *Holding* both the Shift key and the Ctrl key, and selecting a further record will select all the records between the record and the groups of records already selected, which can also be marked.

- *pressing* and *holding* the Ctrl key and *selecting* the records one by one, will select successive records. Then *selecting* the List/Marked option in the menu bar will mark the records

- all of the records can be Marked or un-Marked in one step by using the List/Mark All and List/Unmark All options in the menu bar

Viewing & Filtering Records in Summary Lists

The summary list can be filtered to display only marked or unmarked records by selecting List/View Marked or List/View Unmarked. To restore the view to see all the records, select List/View All. The marked or unmarked lists can be printed off (see Printing Lists below).

Another method of marking or flagging records so you can go back to them at a later date is to use the User Field. See User Field & Notes in the Other Features section

Record Detail

Viewing Individual Record Details

To view the details of any record in a Summary List, *double click* on the record in the List, or press Enter. The range of data displayed varies according to the type of record ie. the particular database, and to the amount of information available for each establishment or organisation.

Record Detail - Care Homes

Care Home Fields

The fields that are displayed in the Record Detail for care homes, provided there is data available for the field in any particular record, are:

Registration Type
Record Number
Name of Home
Address details
Owner
County or Unitary Authority of Location
District Authority of Location
Inspection & Registration Agency
Inspection Report
Care Commissioners (Social Services)
Primary Care Trust
First Registration Date
Sector

Client Type
Client Type Places
Total Places
Special Client Information

Contact Information

General Enquiries
Person in Charge
Job Title
Telephone

Facsimile
E-mail

Admissions & Contracts
Contact
Job Title
Telephone
Facsimile
E-mail

Weekly Fees Single/Sharing
• Nursing Care
• Personal Care (aka Residential)
Currency of Fee Information

Specialist Care for

Accommodation Type Single/Shared
• Number Rooms with Ensuite
• Number Rooms without Ensuite

Services and Facilities
Languages Spoken
Purpose Built
Quality Assurance Programmes

The names of the Inspection & Registration Agency, Care Commissioners (Social Services) and Primary Care Trust are hyperlinked to those records in Care*Search.*

Searchable & Exportable Fields

The Record Detail displays a wide range of data and data fields, not all of which are searchable or exportable. Details are given in **Appendix 1 Searchable & Exportable Fields** of the searchable fields in each database, and the fields from which records can be exported depending on whether or not the Enhanced Version or the Complete Version is being used.

Field Descriptions

Further information about these fields, and the data fields in all the other databases on Care*Search,* are listed in alphabetical order in **Appendix 3 Field Descriptions & Notes**.

This also includes the descriptive text that is provided on the Record Detail page for each record in the Hospitals, Hospices & Clinics database, the Hospital and Clinics Groups database, the Care Home Groups database, and the Financial Information database, although this is not a searchable or exportable field.

The same applies to the baseline fees that are given in table form in the Care Commissioners database, which is also listed in Appendix 3.

Inspection Reports

Currently inspection reports are only accessible online for English care homes via the Commission for Social Care Inspection (CSCI) website.

Clicking on <u>Search here</u> next to the Inspection Report field in the care home record will open the web browser on your computer to CSCI website's Directory of Care Services. From here, you can find the care home by entering the name of the home in the Service Name field and then looking through the search results. You can narrow the search down by selecting Care Home first from the Service/Establishment drop down list.

As care homes names on the website may be slightly different from those in Care*Search*, it may be easier to enter a part of the name in the Service Name field instead, though if it is a common name eg. The Gables, there will be many care homes in the search results. You can further narrow down the search results by selecting a region or by using the postcode search facility. For example if you want to look at the inspection report for The Gables in Skipton, West Yorkshire, as illustrated below, you would enter/select in CSCI Directory of Care Services:

Service Name: 'the gables'

Service/Establishment: Care Homes

Region: Yorkshire & Humberside

CSCI Directory of Care Services - Search Page

From the search results, click on the home for which you want the inspection report, and the CSCI record for the home then displays. Scroll down to the bottom of the page to Inspection Reports:

CSCI Directory of Care Services - Care Home Record Page

Most homes in the Directory of Care Services will have at least one, if several, inspection reports listed. The date of the most recent inspection report is listed last. To the right of each date is a link View/Download report, from where you can view the report for the home in Adobe Acrobat.

CSCI Care Home Inspection Report - Cover and First Page

Printing Lists

The summary list that is currently displayed, either from a current search or from a stored list, can be printed by selecting File/Print. This will display the list in print preview, with the selection criteria that you have used to select the records showing at the top of the list. Clicking on the printer button will then print the list.

Printing a list in this way is a useful alternative to printing one of the reports that are available in from the Reports menu, and you can of course sort any of the columns in the summary list in ascending or descending order before you print it.

Saving Searches, Saving Search Results, and Reports

Saving Searches

Search strategies i.e. fields used and search criteria entered, can be saved by selecting File/Save/Search in the menu bar. The Select Search window opens with any previously saved searches displayed below <New>.
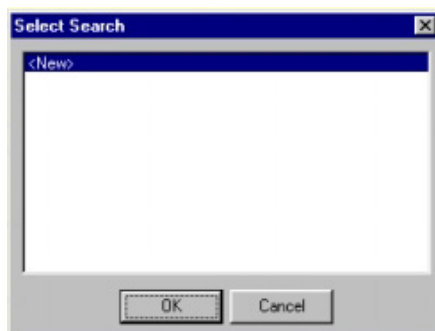
If you want to save a search that you have just created, *select* <New>, *click* OK, and the New CareSearch Search window opens, which shows a default name CareSearch CA Search #1 (or #2, #3, etc for each new search that is being set up). In this case the CA refers to the Care Homes database. In the Care Home Groups database, it will be CO. These are only codes and are not relevant to how you name your search. You can simply overwrite this with the name of your new search if you wish.
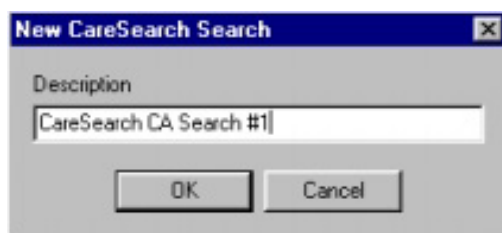
Alternatively, you can *choose* from the Select Search window, the name of a previously saved search that you no longer need (you may have just created a new one that is very similar), and *click* OK. This will overwrite the old search with the new one. The Confirm box will display asking if you wish to overwrite the existing specified saved search.

Existing saved searches are retrieved by selecting File/Open/Search to open the Select Search window that lists the currently saved searches. Further options are available by *right-clicking* on the required search name to display a list of options:
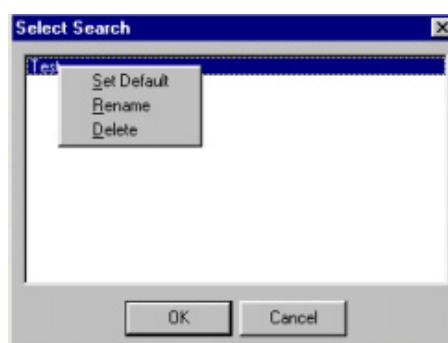
- *Set Default* to have the search load as the default search whenever Care*Search* is opened. This default search is removed by *right-clicking* and *unticking* Set Default

- *Rename* to rename the saved search

- *Delete* to delete the search. The search will not be deleted immediately, and the delete flag can be toggled on and off within a Care*Search* session. When Care*Search* is closed

and re-opened, the search will have been deleted

Saved searches are stored by default in the Userdata folder in C:\Program Files\Laing_Buisson\ CareSrch. Saved searches are not overwritten when a new CD is installed and users can continue to use their saved searches from one issue to the next.

Saving Search Results as Stored Lists

Search results (the summary list) can be saved as a stored list and these lists can be edited to add or remove records. The storing of lists enables users to build up and maintain lists of records for frequent use eg. a list of approved providers, care homes to be contacted.

To save the records in a summary list select File/Save/Stored Lists in the menu bar, and choose which records to store from the options in the Stored Results List window under Records To Store as below:

- *Current* means the single record selected in the summary list as indicated by the black arrow at the beginning of the record

- *All* means all the records in the summary list

- *Marked* means all the records asterisked (and highlighted, if the Highlight On option has been selected)

- *Unmarked* means all the records that have not been asterisked

If records have been marked (asterisked) in the summary list of search results, the asterisk itself will not be preserved in the stored list. This is irrespective of the stored list option chosen eg. All, Marked etc

You should then enter the name of your new stored list in the Stored List Name field at the bottom of the window, and click on Store To. The number of records in each list is also saved. Alternatively if you have previously saved a stored list you can select an existing name from the drop down list in this field. This will overwrite the records previously held in that stored list.

'Stored list' files have a file extension of cds, and are stored by default in the Userdata folder in C:\Program Files\Laing&Buisson\CareSrch. Stored lists are not overwritten when a new CD is installed and users can continue to use the lists they have saved from one issue to the next.

Opening, Renaming & Deleting Existing Stored Lists

Existing stored lists can be opened by selecting File/Open/Stored Lists in the menu bar, selecting the list required in the Open Stored List window (see illustration below), and clicking OK.

Existing lists can be renamed or deleted by selecting File/Save/Stored Lists, clicking on the drop down window in the Stored List Name field, selecting the list required in the Save As window, and clicking Save. The list then appears in the Stored List Name field, and can be renamed or deleted by clicking on the Rename or Delete buttons, which are now activated.

Adding or Subtracting Records To and From an Existing Stored List

Other options in the Stored Results List window include the facility to have the records that are produced by a new search appended to or subtracted from an existing stored list. These buttons will activate once the list that is to be edited has been selected from the Stored List Name field.

Closed Records in Stored Lists

The records in Stored Lists have unique ID numbers that do not change from one issue of Care*Search* to the next. Should the records of homes, hospitals etc that are in a stored list subsequently close, the first time that you open that stored list in a new issue of the CD, Care*Search* will list the closed records in a dialog box with the heading 'The following are now closed and have been deleted from your list, and the list will be updated.'

Stored List Search Criteria

It is advisable to separately save the search used to produce the Summary List when saving a Stored List. Search criteria are not saved with Stored Lists.

Reports

When a summary list is displayed, you can select Reports in the menu bar and in the Reports window (the window for the Care Homes database is illustrated below), choose from a selection of standard report options, each with a different combination of information, all of which run from the records in the current summary list. If there is no current list, then the Reports option will not be available.
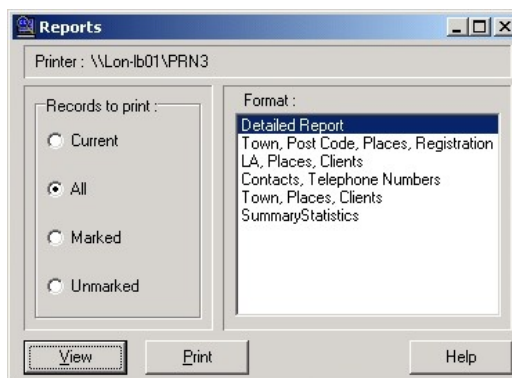
In the Reports window, you can also select whether you want the report to include just the current record selected in the Summary List, all the records in the Summary List, only the marked records, or only the unmarked records.

Preview or Print Reports

The reports can be previewed before printing, one record at a time, by clicking the View button. A report preview window opens from where you can browse the records using the navigation arrows in the window's toolbar (see *Report Toolbar* below).

To print the report, you can either click on the Print Set up icon if you only wish to print a certain number of pages of the report (there is one record for each page), or click on the Print icon to print the entire report.

Reports are displayed in a separate window to the CareSearch window ie. the summary list or record detail page showing at the time remains on display behind the report window and either window can be re-sized independently. The report window has the name of the type of report that has been selected (see the different types of reports in *Report Options* below). You can have any number of report windows open at a time.

Report Toolbar
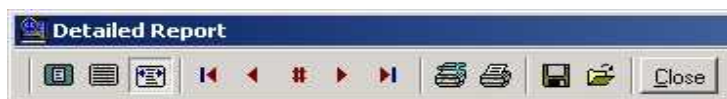
The icons on the Report Toolbar are, in the same order as the illustration above:

- **Zoom to Fit** - resizes the view of the report so that the whole report fits into the screen. The size of the print may be too small to read, but it gives an idea of the amount of detail in any particular type of report.

- **100%** - resizes the view of the report so that the report is shown actual size on the screen, with the top of the report displayed

- **Zoom to Width** - this is the default view, with the report expanded to fit across the width of the screen

- **First Page** - moves the view back to the first record in the report

- **Previous Page** - moves the view back to the immediately preceding record in the report

- **Go to Page** - displays the Go To box where you can enter the page the of the report that you wish to view. This is useful to selectively view records in report with many records

- **Next Page** - moves the view forward to the next record in the report

- **Last Page** - moves the view forward to the last record in the report

- **Printer Setup** - displays the Print box where you can enter the particular pages of the report that you want to print

- **Print** - prints all pages in the report

- **Save Report** - displays the Save Report box. Enter a name for your report in the File Name field and click Save. Report files have a file extension of qrp, and stored by default in the Userdata folder in C:\Program Files\Laing&Buisson\CareSrch. Reports are not overwritten when a new CD is installed and users can continue to use the lists they have saved from one issue to the next.

- **Load Report** - displays the Load Report box at the Userdata folder default location or where the previous report was saved. Select the report you want, by browsing if necessary, and click Open. Reports can also be opened by selecting File/Open/Report in the menu bar

Report Options

The reports available in the **Care Homes** and the **Hospitals, Hospices & Clinics** databases are:

- *Detailed Report* shows all or most of the information associated with the record according to the type of records involved

- *Town, Post Code, Places, Registration* report summarises the location, post code, number of places and the type of record

- *LA, Places, Clients* report summarises the local authority location, number of places and type of clients accommodated

- *Contacts, Telephone Numbers* report summarises contact details for people such as managers and their telephone numbers

- *Town, Places, Clients* report summarises the location, number of places and type of client accommodated

The **Care Homes** database also has an additional report *Summary Statistics* (illustrated below) that calculates the total number of homes and places, by sector ie. private, voluntary, local authority, NHS, for the records in the current summary list, and gives an overall total at the end (not shown in illustration below).

When using this report to calculate capacity statistics by client type, you should normally select on the *Primary* Client Type field (see the Help file for this field). This report can sometimes take a while to run.

Care Homes Database - Summary Statistics Report (part)

The **Care Home Groups** database also has a *Group Total Homes & Beds* report, which displays the total number of homes and beds operated by the care home groups selected in the summary list, together with the criteria used to select the records in the summary list, but without the category and the telephone number columns.
The report will display the records in the same order as the summary list, which can be sorted by the homes or beds column in descending or ascending order as desired

Record Selection Criteria

All reports show at the top of the first page of the report, the criteria used to select the records in the report. In the case of the *Summary Statistics* report in the **Care Homes** database, the criteria shown are those used to select the records on which the calculations in the report are based.

Exporting Records

This section only applies to users who have the Enhanced or Complete versions of Care*Search* both of which have the facility to export records. In the Enhanced version, contact names, address, and telephone numbers can be exported, whereas in the Complete version, almost all data is exportable.

Please refer to **Appendix 1 Searchable & Exportable Fields** for a full list of the fields that can be downloaded from the two different versions of Care*Search.*

Non-Downloadable/Exportable Fields

There is some data as below that cannot be downloaded/exported, and details about this are given at the beginning of Appendix 1.

• fields where there are multiple occurrences of data

• the descriptive text in the Record Detail pages

• the baseline fees in the Care Commissioners database

• the individual financial accounts in the Financial Information database

Exporting Data in the Summary List

You can export the data in a Summary List as explained below. You can export all the records, a single record, only the marked records, or just the unmarked records. The example below refers to the Care Homes database, but a similar process applies in the Care Home Groups database, the Hospitals, Hospices & Clinics database, and the Hospital & Clinic Groups database. There are several stages to exporting records:

• open the Export window

• create an output file (or use an existing one)

• create an export format (ie. the set of fields to be exported) or use an existing one

• choose whether or not to exclude records where there is no named manager or owner, and choose a salutation (where one or other of the fields are included in the fields you are exporting)

• finally, a single click to export the records

Export Window

(1) In the Summary List view *click* on Export on the menu bar to bring up the Export window box (the illustration below is the Export window in the Care Homes database)

(2) In the Output entry box at the top of the window, *click* on the **...** (ellipsis) button to the right, and in the Save As window (illustrated below), *enter* a name for the file of exported records in the File Name field. Unless the location of the Userdata folder has been changed previously, the Save As window automatically opens in the default location, which is C:\Program Files\Laing & Buisson\CareSrch\Userdata

(3)   then *select* from the Save as Type field drop down list, one or other of the two types of file in which you can save your exported records. These are text files, with the file extension txt, or comma separated variable files, with the file extension csv. *Click* on Save to return to the Export window.

Text files can be used directly in mail merge applications such as Word, or imported into a relational database such as Access. Alternatively, csv files can be opened directly in Excel by double clicking on the file in say Windows Explorer. Further details about this are given in **Appendix 2 Using Exported Data**

(4)   if you have previously exported data (and you have not created a new Userdata folder in the meantime), these earlier files will be displayed in the Save As window. You can use the names of any of these files for a new file of exported records, by *double clicking* on the file. The name of the file then appears in the File Name field. Note that if you now export records to this file, the records in the original file will be overwritten. Again c*lick* on Save to return to the Export window

(5)   in the Export window you can now choose an existing format (ie. a particular selection of fields from which you want to export the data) from the Format box by *clicking* on it, or create a new format by *clicking* on New. You can also edit an existing format after it has been selected by clicking Edit.

Export Format

Unless you are using CareSearch for the first time, any export formats you have previously created will be listed in the Format pane of the Export window, together with a number of pre-installed formats, depending on the database that is being used at the time.

Pre-Installed Export Formats

In the Care Homes database, two export formats are provided in the Format list as follows:

∗   *Care Home Managers*

Fields: Manager Name, Manager Job Title, Manager Salutation, Care Home Name, Address 1, Address 2, Town, County, Postcode

∗   *Care Home Owners*

Fields: Owner Name, Owner Salutation, Care Home Name, Address 1, Address 2, Town, County, Postcode

In the Hospitals, Hospices and Clinics database, a single export format is provided:

∗   *Hospitals csv #1*

Fields: Unique Record Number, Establishment Name, Address 1, Address 2, Town, County, Postcode, Contact Name

In the Care Home Groups database, again a single export format is provided:

∗   *Care Home Groups csv #1*

Fields: Unique Record Number, Group Name, Address 1, Address 2, Town, County, Postcode, Telephone Number, Contact Job Title

New Export Format

A new export format can be created by clicking on New on right hand side of the Export window. The Define New Export Format window is displayed (illustrated below). You select the fields you want to be included in your exported records, by *selecting* the fields from the list in the Available Fields pane on the left hand side, and then *clicking* on the > arrow button in the middle of the window, or simply *double-clicking* on the field. The selected fields disappear from the left hand pane and re-appear in the right hand pane.
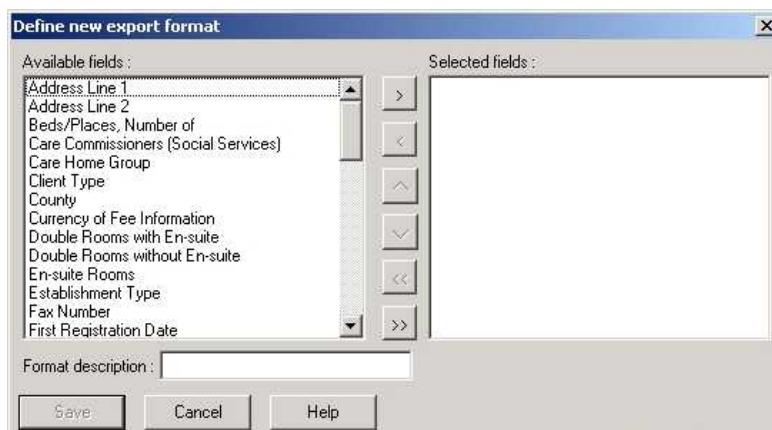
You can select all the fields in the Available Fields list by clicking on the » double arrow button. You can de-select a field by clicking on the < button, or de-select all the fields by clicking on the « button.

The order of the fields in the Selected Fields pane is the order in which the fields will appear in the exported records. Once you have selected the fields you want, you can move a particular field up or down in relation to other fields using the ∧ or ∨ arrows

Finally, you need to name the new export format. You cannot give a new format the same name as an existing one. *Enter* the new name in the Format Description box at the bottom of the window and *click* on Save.

Edit or Delete Export Format

You can edit an existing export format by *selecting* the format in the Formats pane, and *clicking* on Edit. Then in the Edit Export Format window, add, remove or sort fields in the same way as for a new export format. Once the format has been edited, *click* on Save to return to the Export window

You can delete any of the existing export formats, by *selecting* the format in the Formats pane, and *clicking* on the Delete button on the right side of the Export window. You will be asked to confirm that you want to delete the export format.

Export Field Names

Having created or selected the output file and the export format, you need to decide if you want to include the field names for the fields of data that are in your export format as the first row of your data. The Export Field Names tick box in the lower left hand side of the Export window is ticked by default, since in many cases you will want the field names to be in the data, or it doesn't make any difference either way. There are not many occasions when you will need to exclude the field names.

Before You Export the Records

The Export button in the lower left hand corner of the Export window starts the export process. Before you can export records, you should have selected an output file, and an export format, as explained above, otherwise the Export button will be greyed out.

When any of the contact type fields in the Hospital, Hospices & Clinics database, the Care Home Groups database, or the Hospital & Clinics Groups database eg. Hospital/Clinic Director, Managing Director/Chief Executive, Finance Director, Business Development Director, are included in an export format, it is the name of the contact holding this position that is exported. These contact names will also be at the beginning of each row of the records that are exported irrespective of where the contact type field is in the Export Format window. This is a feature of there being multiple contacts for the same address, and the contact names have to be extracted first before the addresses.

When any of the contact type fields in these databases are selected for export, the Contact Job Title field also has to be selected, since the data in the contact type fields is the name of the person holding this position and not their job title

Start the Export

To start the export process, *click* on the Export button. If contact type fields are included in the fields you are exporting, which they invariably are, then a Records with No Named Manager dialog box will appear. In the case of the Care Homes database, the box will appear if the Manager field has been included in the export format.

Records with No Named Manager

This box allows you to choose whether or not to exclude records that have no personal addressee, and to insert substitute names and salutations eg. you may want to mail-merge some letters, but only want to mail named individuals. In fact there are very few records in the databases without a named manager, and these are almost entirely care homes where the owner is also the manager (see Records with No Named Owner below).

If you don't want to include these records, you should tick the Exclude Record box, which by default is unticked.

If you don't tick the Exclude Record box, and you want to include substitute names and salutations, you can either select from the drop down lists in the Addressee (Manager) and Salutation fields - the options for the Addressee (Manager) drop down list are The Manager, The Person in Charge and The Senior Purchaser, with matching or alternative Salutations beneath - or you can create your addressee by *highlighting* the Addressee field and *pressing* Delete to clear the field, and entering your own eg. The Director, The Marketing Manager, The Matron, and then do likewise with the Salutation field.

You also have the option of not ticking the Exclude Record box, but then of not including any substitute names and salutations, by unticking the Substitute the Following Information box.

Records for Company Owned Homes (Care Homes Database only)

In the case of the Care Homes database, if the Owner field has been included in the export format, then after the Records with No Named Manager box, a further dialog box, Records for Company Owned Homes, will appear. This allows you to decide how to treat the care home records which are owned by organisations (companies, charities, local authorities, NHS trusts) rather than individuals, and which will not have a personal addressee. Approximately 60% of care homes are owned by organisations, so only 40% of homes have individual owners. Of the care homes owned by organisations, 70% of these are owned by care home groups (45% of the total number of care homes) where the head office address is nearly always at a separate address to one of its care homes.

As with the Records with No Named Manager box, you can decide to exclude records that are owned by an organisation by ticking the Exclude Records From Export box.

If you don't tick the Exclude Record box, and you want to include substitute names and salutations, you can either select from the drop down lists in the Addressee (Owner) and Salutation fields - the options for the Addressee (Owner) drop down list are The Owner or The Proprietor, with matching or alternative Salutations beneath - or you can create your addressee by *highlighting* the Addressee field and *pressing* Delete to clear the field, and entering your own, and do likewise with the Salutation field.

Unlike records where there is no named manager, this box deals with records where there is a named owner, but it could be the name of an organisation rather than an individual. If a substitute name is therefore selected eg. The Proprietor, then this will replace the name of the organisation in the exported records ie. the name of the organisation will no longer appear.

Using Contact Types in Record Exports (All Databases except Care Homes)

As contact names are not necessarily available in any one record for all contact types, and this applies particularly to the smaller establishments or groups eg. the smaller care home groups will most likely have a managing director or chief executive, a finance director, an administration manager, but they are unlikely to have a business development director or human resources director as well. If therefore you select only one or two of the less common contact types in your export format (depending on the database) eg. Building/Estate Manager, Contracts Manager, Materials Manager, Quality Assurance Director, Risk Manager, and you tick the Exclude Record box, the number of records that will be exported from your search results could be quite low.

On the other hand, if you untick the Exclude Record box, a large proportion of the records will use substitute names and salutations, which may not be appropriate. An alternative approach might be to select the contact types that are related eg. Business Development Director and Marketing Manager, and then insert a more specific addressee eg. The Marketing Director, for the records without one or other of these contact types. Remember however that selecting more than one contact type will in many cases export more than one record for an establishment or group, which may have people in more than one of the chosen contact types.

If you only want to export one record for each establishment or group, you should use the Primary Contact Name field in the export format. This contact is invariably the Hospital

Director or Clinic Director in the case of the Hospitals, Hospices & Clinics database, and the Managing Director or Chief Executive in the case of the Care Home Groups, and Hospital & Clinics Groups databases.

Export Completed

Having clicked on the Export button, and decided about excluding records and substitute names, your records will then be exported, and on completion there will be a message Export Completed Successfully.

If there are many records to be exported, this may take some time, and this is indicated in a Progress bar at the bottom of the window.

Bear in mind that if you have ticked the Exclude Record box, and/or only selected a few contact types in the export format, the number of records actually exported may be lower than the number of records in your original search, since establishments or groups may not have a personal addressee, or a contact name for a particular contact type. The number of records given in the left hand side of the status bar at the bottom of the Export window is the number of records in the search results ie. the number of records that potentially can be exported, and not the number of records exported using a particular export format.

The files of exported data are stored by default in the Userdata folder in C:\Program Files\Laing_Buisson\CareSrch. These text files are not overwritten when a new CD is installed and users can continue to use these files from one issue to the next.

Exporting of Client Types

Unlike other fields that are not exportable because there are multiple occurrences of data for any one establishment, as in the Services & Facilities field, the multiple client type descriptions in the Client Type field of the Care Homes database can be exported into a single field. If you export the data from this field, the client descriptions, as many as there are for each particular care home, are exported as text into a single field, and each client description is separated from the other within the field by a semi-colon. This separator, or delimiter, can be changed if required, and the Care*Search* Help Desk can advise you how to do this.

Further Advice

Please refer to **Appendix 2 Using Exported Data**, for advice on how to:

- view exported text files

- open & Save the Data in Excel

- use the Data directly for a Mail Merge

- import the Data into a Database

Financial Information

The Financial Information database consists of records of the head offices of some 230 independent organisations in the UK that provide care and health services, together with financial information for up to four years.

Using Adobe Acrobat Reader

The financial information for each organisation is provided as separate pdf documents so you will need to have Adobe Acrobat Reader installed on your machine before you can view the documents. You can install Adobe Reader in two ways:

- from the blue installation screen by clicking on the Install Acrobat Reader ® item in the menu (to display the installation screen simply push the button on your CD drive to eject the CD caddy, then push the CD back in again and wait for the installation screen to load automatically), or

- if you are already in the Financial Information database, and you have not yet loaded Adobe Reader, and you attempt to open one of the financial information documents, you get receive a message:

  'Adobe Reader ® is required to view the financial information. Would you like to install it now?' Click on Yes, and follow the on-screen instructions. If the CareSearch CD is not in your CD drive, you will receive a message 'Cannot locate Adobe Reader ®. Please ensure that you have the correct CD in your CD drive'

Format of Financial Information

The financial information is presented in one of three formats according to the type of organisation and its reporting requirements:

- For-profit companies

- Not-for-profit organisations including charities; though some not-for-profit organisations opt to present their accounts in the for-profit company format; and

- Insurance companies, which are subject to specific accounting requirements, in particular to report on a 'technical account' basis.

Variations in format, all of which relate to profit and loss statements, have been kept to the minimum. The balance sheet format is invariable.

Criteria for Inclusion in the Database

Independent sector holding organisations, and subsidiaries where relevant, whose primary activity is:

- hospital provision (all organisations with available accounts, regardless of revenue)

- medical insurance (all organisations with available accounts, regardless of revenue)

- care home provision (with revenue above £5 million per annum)

- flexible healthcare staffing, including domiciliary care (with revenue above £5 million per annum)

- ancillary healthcare service provision (pathology, diagnostic equipment etc., with revenue above £5 million per annum)

- provision of other miscellaneous healthcare services (with revenue above £5 million per annum)

Organisations are excluded where healthcare is a subsidiary activity and cannot be separately identified.

Interpretation of data

Accounting bases, terms, definitions and periods may vary and inter-company figures may, therefore, not be strictly comparable. Varying information disclosed in accounts may result in anomalies.

Holding companies and subsidiaries may acquire assets through different companies, and results may or may not reflect charges for interest, equipment and property leases, management and other inter-company charges. Allowances should be made for these variances when comparing results.

Particular care should be taken when studying the financial results, noting the effect of inter-company relationships, other trading activities, date of commencement of business, date of opening or acquisition of care homes and hospitals and method of accounting for subsidiaries, depreciation and capitalisation of interest.

Survey Of Financial Results - Definitions and Conventions

The principal activity of each organisation is described at the top right hand side of its entry.

Credit items are shown in brackets ( ).

Blank fields indicate no relevant information is available.

Notes on the Profit and Loss figures or on the Balance Sheet do not appear for every organisation, due either to non-disclosure or to non-relevance. Other notes may be shown where considered relevant.

PROFIT AND LOSS

Personnel costs include total cost of salaries, wages and pensions for employees, and exclude directors' remuneration where separately identified.

Directors' remuneration includes pensions, fees and other remuneration as disclosed. It may include benefits in kind which are not otherwise included in personnel costs.

Other operating costs cover all other expenses except those disclosed separately.

EBITDAR represents Earnings (operating profit) Before Interest, Tax, Depreciation, Amortisation of goodwill and asset/lease and Rent. EBITDAR figures facilitate comparisons between care home providers that may own or lease their assets.

EBITDA represents Earnings (operating profit) Before Interest, Tax, Depreciation and Amortisation of goodwill (i.e. EBITDAR less asset/lease RENT).

Depreciation/amortisation includes amortisation of leases and intangibles and depreciation of leased equipment when stated, on a straight line basis unless otherwise noted.

Asset lease/rental is as disclosed in notes to accounts. This normally excludes finance leases.

Exceptional items are as disclosed. Exceptional losses are shown in brackets ( ).

Interest expense shows gross interest payable. Interest receivable is included in **Investment/other income**. Capitalised interest is shown in notes.

Profit before interest and tax, **Profit before Tax** and **Retained profit** - losses are shown in brackets ( ).

Taxation credits are shown in brackets ( ).

Extraordinary item credits are shown in brackets ( ). Further information is provided in notes.

KEY STATISTICS – see definitions above. Losses are indicated by a minus sign**.**

EMPLOYEE INFORMATION

Numbers as stated may include Directors and part time as well as full time employees. Some organisations may subcontract services or change their disclosure basis, which may affect comparability.

Personnel cost per employee   = **Personnel costs** divided by **Numbers** of employees, annualised where accounting period is different from 12 months.

Operating revenue per employee = **Operating Revenue** divided by **Numbers** of employees, annualised where accounting period is different from 12 months.

Fixed assets per employee = **Total fixed assets** divided by **Numbers** of employees.

BALANCE SHEET

Fixed assets

- **tangible** represent land & buildings and plant & equipment at cost or valuation less accumulated depreciation.
- **intangible** usually comprise capitalised costs of commissioning facilities less accumulated amortisation.

Stock comprises items purchased for resale and/or stocks of consumables.

Trade debtors are as stated in notes to accounts and represent amounts due from patients, residents and other purchasers of services.

Cash may include short term investments.

Other current assets usually comprise prepayments and sundry debtors.

Current liabilities are liabilities due within one year as stated.

Long term liabilities are liabilities due after more than 1 year as stated

Provisions represent provisions for taxation and charges, usually deferred taxation.

RATIOS

Current ratio = Total current assets / Current liabilities x 100.

Interest cover ratio = **Profit before interest & tax** / **Interest expense** x 100

Return on shareholder funds = **Profit before tax** (annualised)   / **Total equity and reserves** x 100

Return on capital employed = **Profit before Interest & Tax** (annualised) / (**Total equity and reserves** + **Total long term liabilities)** x 100

Investment ratio = **Operating revenue** (annualised) / (**Total equity and reserves** + **Total long term liabilities)** x 100

Debt equity ratio = (Long term liabilities - **Provisions** - **Cash) / Total equity and reserves** x 100

Fixed Asset ratio = **Operating revenue** (annualised) / **Total fixed assets** x 100

Debtor Days = **Trade debtors** x 365 / **Operating revenue** (annualised)

OTHER INFORMATION

Ownership category is at date of publication, which may be different from the date of accounts. The categories are:

- UK Publicly Quoted Company or Subsidiary

- Non-UK Publicly Quoted Company or Subsidiary

- Non-UK Private Company

- Private Company

- Provident Association or Subsidiary

- Non Profit Organisation

- Organisation formed to operate former Local Authority homes

- Mutual Company

Secretary is the Company Secretary at the date of the accounts.

Address is the trading address of the organisation. The registered office, if different, follows.

Auditors are at the date of latest accounts.

Company number is the official number of company used by Companies Registration for identification. SC = Registered in Scotland. The Charity number is the official number of the charity used by Registrar of Charities. For charitable organisations company numbers are followed by (Co) and charity numbers are followed by (Ch).

Depreciation basis is as stated in the latest accounts.

Loan details represents information on loans as disclosed in latest accounts.

Capital commitments are as stated in the latest accounts, either contracted or authorised but not contracted.

Other Features

Complementary Mailing of Care Homes & Care Home Groups

If you wish to mail all the care homes in a particular area, as well as the head offices of the care home groups that operate care homes in that area, this can be done as follows:

- in the Home screen, *select* the Care Homes database

- using the Search Form, *select* the search fields you wish to use, *enter* your selection criteria, and *click* on Find to display the search results in the Summary List

- from the Summary List, use Export to export the mailing fields you wish to use for the care home mailing **and include** the Care Home Group field. On completion of the export a message will appear:

  Export completed successfully – Group IDs copied to clipboard

- return to the Home screen, and *select* the Care Home Groups database

- *click* on the **...** (ellipsis) button to the right of any one of the search field names, and *select* the Unique Record Number field from the alphabetical list of fields that appears

- *click* to place the cursor in the search field box to the right of the Unique Record Number search field, and *copy* and *paste*, using the keys Ctrl+V, the Care Home Group ID numbers into the search field

- *click* on Find to display the care home groups in the Summary List, and then use Export to export the data in the usual way to mail the care home groups

User Flag & Notes

User flag fields can be used to record information defined by the individual user against individual records. There are five user flags, User Flag 1, User Flag 2 etc, and these work just like any other field. For example, you could select User Flag 1 to record establishments that have responded favourably to an enquiry as 'Y', establishments that have responded unfavourably as 'N', and establishments where you are waiting for a response as 'W'. The names of the user flag fields can be changed to ones of your choice, as described in Settings below.

The Notes field is used to add your own information or comments in free text to the record of any establishment.

Any information in the User Flag fields or Notes is stored in a separate file, Users.db, in the users own directory, the default location of which is C:\Program Files\Laing & Buisson\CareSrch\Userdata. This file is not overwritten when a new issue of CareSearch is installed, and the notes will continue to appear in the record into which they were originally entered. The only time that particular notes disappear is when a record is no longer on Care*Search* because for example an establishment had closed down or a group has ceased trading.

Flagging Records

To enter a user flag for a particular establishment, you need to first display the record in the Record Detail screen. For example, go to the Care Homes Search Form, decide on Home Name as the search criterion, find and select in the index for the Home Name field, the home that you want, click on Find to display the record's Details, and then click on Notes in the menu bar at the top of the page.

You can then enter a character of your choice (one character only, case insensitive) in one of the User Flag boxes. If required, you can also enter free text in the Notes box, and this may or may not be relevant to the user flags. Carriage returns can also be entered in the Notes field.

Once you have entered the character(s) in the User Flag field and/or text in the Notes field, click on Save. If you return to the Record Details screen of the care home record, you will see at the bottom of the page a User Information box with the corresponding user flag(s) and character(s), and any notes that have been added.

Retrieving Flagged records

To retrieve the records that you have flagged, go to the Search Form of the relevant database, *select* the appropriate user flag field from the field names drop down list (click on the (magnifying glass) button to the right of the field names), and *enter* your search criterion in the user flag field. This should either be the single character you have used previously eg. 'N' or 'N|Y', or the wild cards '*' or '%' wild cards. These wild cards will select all flagged records in that user flag field regardless of the characters entered. Then *click* on Find in the usual way. The records appear as a Summary List.

To retrieve establishments where you have entered text in the Notes box, go to the relevant Search Form, *select* the Notes field from the field names drop down list, *enter* the '*' or '%' wild cards, and *click* on Find.

The user flag fields and the notes fields can be cleared by *selecting* the data and *pressing* Delete or Ctrl+X. Be careful to remove spaces and carriage returns in the Notes field as these will still display in the record Detail page, and the records will be selected if wild card characters are used in the Notes field.

Settings

There are a number of features or settings in Care*Search* that users can edit or set for themselves as explained below. These are maintained in the Options tab of the Edit Preferences box that is accessed via Settings, then Preferences in the Menu bar. The names of the user flag fields are set in the other tab, User Flags.

CD Drive Directory

When Care*Search* is installed, the default CD drive will be set to that used during the installation. If a user then places the Care*Search* CD in a different drive, when the user attempts to open Care*Search*, they will be prompted in a pop up window to select the correct CD from a drop down list. This can be set to a mapped network drive for a network installation. This prompt appears whenever the CD is not present in the chosen drive (or if the CD cannot be read).

A user can change the drive they wish to use at any time by selecting a different drive from the drop down list in the CD Drive Directory box in the Options tab.

Index Directory

During the installation of Care*Search*, users are asked if they wish to install the index files onto their local drive (the preferred option), and the default destination for these files is C:\Program Files\Laing & Buisson\CareSrch\Index. If necessary, the user can subsequently change the location of the index files by selecting a new location using the browse button at the end of the box, and then copying the index files to the new folder.

User Data Directory

During the installation of Care*Search*, users are also asked to confirm the default location of the Userdata folder where saved searches, stored lists, and reports are stored. The default location for these files is C:\Program Files\Laing & Buisson\CareSrch\Userdata, which is the preferred option. If necessary, the user can subsequently change the location of the Userdata folder by selecting a new location using the browse button at the end of the box, and then copying the files in the old user data folder to the new one.

Background Colour

You can select a different background colour, for all Care*Search* screens, from the default colour, which is cream.

Marked Colour

You can select a different colour, with which records in the Summary List are marked, from the default colour, which is cyan.

Highlight Colour

Where information is provided under Special Client Information in records in the Care Homes database, the keyword(s) that have been searched for in that field on the Search page, are highlighted on the Record Detail page. The default colour is red, but you can select a different colour.

Show Hints

If you tick this box, this switches on the help bubbles that appear at certain places on the Care*Search* screen whenever the mouse pauses over the area.

Show Warning on Sorting Large Search Results

Users can choose whether they wish to receive a warning that the sorting of records in the Summary List may take some time. The sort warning is triggered on 1000 records or more, and a Sort on Large Set of Data dialog box comes up with the message:

> *Initial sorting of a large number of records will be slow. Do you want to proceed?*

The dialog box has a check box option 'Do not show this warning message again', which if checked will prevent this message being shown again for sorts of 1000+ records for the current session.

Lines to show in List

When looking at individual care home group and hospital & clinic group records, you can view a list of all care homes/hospitals & clinics that the group operates by clicking on the care Homes or Hospitals, Hospices & Clinics link towards the bottom of the Record Details screen.

The current default setting is to display 14 records per page, but this figure can be increased or decreased by clicking on the up or down arrow in the Lines to show in List box.

User Flags

The five user flag fields are maintained in the User Flag tab of the Edit Preferences box, which is accessed via Settings, then Preferences in the Menu bar.

In the User Flags tab, if you are using the user flag fields to record certain information, you can change the names of the flags here to better reflect the information entered or the type of records you have flagged eg. using the example in the User Flags & Notes section above, User Flag 1 could be renamed Enquiry Outcome to refer to the use of that flag field to record the outcome of enquiries.

When you then want to search for the records you have flagged, the new name for the flag field will be in the drop down list of search fields with that name eg. Enquiry Outcome, in the Search Form of all of the databases.

Help

- Help on the menu bar summarises the functions of the features available on the Menu bar

- Support provides the Help Desk telephone number 020 7923 5395 for Care*Search* Users

- About gives some general information about Laing & Buisson, provides details on how data is collected, and also a brief description of the Care*Search* CD

Appendix 1

Searchable & Exportable Fields

This appendix lists in the table below the searchable fields in each database on Care*Search*, and the fields from which records can be exported/downloaded depending on whether or not the Enhanced Version or the Complete Version is being used.

Non-Searchable or Exportable Fields

There is some data that is not searchable and/or which cannot be exported:

Email Addresses

Email addresses cannot be exported in order to prevent inappropriate marketing activities such as spamming.

Fields with Multiple Occurrences of Data

There are a few fields such as services and facilities, and specialist care, which are searchable, but which cannot be exported as there are multiple occurrences of data for each record.

The exception is the client data in the Care Homes Database, where the multiple clients associated with an establishment can be exported by selecting the client type field. The client type data is then exported as a single field with the client descriptions separated by semi-colons.

However in the case of the Client Type field, the primary client or patient type for a care home or hospital can be searched and exported using the Primary Client Type or Primary Patient Type field in the Care Homes or Hospital, Hospices and Clinics databases respectively

User Flag and Notes Fields

The five user flag fields are searchable, but not exportable.

Descriptive Text in Record Detail

The descriptive text that appears in the detailed records in the Hospitals, Hospices and Clinics; Care Home Groups, and Hospital and Clinic Groups databases, cannot be searched or exported. There is no descriptive text for care homes. An explanation of this field however is given in Appendix 3 Field Descriptions & Notes

Baseline Fees in Care Commissioners Record Detail

The baseline fees for each care commissioning authority are shown in a table in the record detail page of the Care Commissioners database. The baseline fee structure for each authority varies considerably eg. some have fees for certain client types and not for others, some have fees for nursing care and /or personal care for some clients, but not for others. In other words the data is not standardised and for this reason cannot be searched or exported. An explanation of this field is however given in Appendix 3 Field Descriptions & Notes.

Financial Accounts

The individual financial accounts of companies and voluntary organisations that are accessed from the Record Detail pages of the Financial Information database can be viewed using Acrobat Reader and printed out, but the data itself is not searchable and cannot be exported.

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Care Homes			
Home Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Owner [1]	4	4	4
Owner Salutation	4	4	4
Care Home Group	4	4	4
Manager [1]	4	4	4
Manager Job Title	4	4	4
Manager Salutation	4	4	4
[1] *These fields display as Owner or Manager in the Export Window, but when exported, the field name is Contact because both fields can be included in the export*			
Beds/Places, Number of	4		4
Care Commissioners (Social Services)	4		4
Client Type	4		4
Client Type Places			
Currency of Fee Information	4		4
Day Places	4		
Dedicated Respite Places	4		
Email	4		
En-suite Rooms	4		4
Establishment Type	4		4
Fax Number	4		4
First Registration Date	4		4
Former Dual Registered Home	4		4
Homes Admissions Contact	4		
Inspection & Registration Agency	4		4
Languages	4		
Location by County or Unitary Authority	4		4
Location by District Authority	4		4
Managing Company	4		4
Nursing Care Maximum Shared Room Fee	4		4
Nursing Care Maximum Single Room Fee	4		4
Nursing Care Minimum Shared Room Fee	4		4
Miles (Postcode Radius Search)	4		4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Care Homes (Cont)			
Notes	4		
Nursing Care Minimum Single Room Fee	4		4
Personal Care Maximum Shared Room Fee	4		4
Personal Care Maximum Single Room Fee	4		4
Personal Care Minimum Shared Room Fee	4		4
Personal Care Minimum Single Room Fee	4		4
Primary Client Type	4		4
Primary Care Trust	4		4
Purpose Built	4		4
Quality Assurance	4		
Region	4		4
Registration Type	4		4
Sector (Private/Voluntary/Public)	4		4
Services & Facilities	4		
Shared Rooms with En-Suite	4		4
Shared Rooms without En-Suite	4		4
Single Rooms	4		4
Single Rooms with En-Suite	4		4
Single Rooms without En-Suite	4		4
Special Client Information	4		
Specialist Care	4		
Unique Record Number	4		4
User Flag	4		
Website	4		4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Care Home Groups			
Group Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name [1]	4		4
Primary Contact Name [2]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
Contact Type	4		4
[1] *when selected, this will extract the name of all senior manager contacts in the group. You will not need to select the Primary Contact Name*			

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Care Home Groups (Cont)			
[2] when selected this will extract the main contact for the group, which is invariably the Managing Director or Chief Executive, but not always			
Care Home Beds Managed	4		4
Care Home Beds Owned, Leased or Managed	4		4
Care Homes Managed	4		4
Care Homes Owned, Leased or Managed	4		4
Category	4		4
Email	4		4
Fax Number	4		4
Notes	4		
Region	4		4
Sector	4		4
Unique Record Number	4		4
User Flag	4		
Website	4		4
Selecting one or more of the contact type fields below will extract only the names of the contact. In order to obtain their job titles then Contact Job Title will also need to be selected			
Administration Manager	via Contact Type		4
Business Development Director	via Contact Type		4
Business Owner/Proprietor	via Contact Type		4
Company Chairman	via Contact Type		4
Finance Director	via Contact Type		4
Home Admissions Contact	via Contact Type		4
Human Resources Director	via Contact Type		4
Managing Director/Chief Executive	via Contact Type		4
Marketing Manager	via Contact Type		4
Nursing Director	via Contact Type		4
Operations Director	via Contact Type		4
Purchasing Manager	via Contact Type		4
Quality Assurance Director	via Contact Type		4
Training Director	via Contact Type		4
Hospitals, Hospices & Clinics			
Establishment Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Post Code	4	4	4
Telephone Number	4	4	4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Hospitals, Hospices & Clinics (Cont)			
Contact Name [1]	4		4
Primary Contact Name [2]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
Contact Type	4		4
[1] *when selected, this will extract the name of all senior manager contacts in the establishment. You will not need to select the Primary Contact Name*			
[2] *when selected, this will extract the main contact for the establishment, which is invariably the Hospital Director, Clinic Director etc, but not always*			
Beds, Number of	4		4
Consulting Rooms	4		4
Currency of Daily Room Charges	4		4
Daily Charge Maximum	4		4
Daily Charge Minimum	4		4
Day Places	4		4
Dedicated Cardiac Theatres	4		4
Dedicated Day Theatres	4		4
Email	4		4
Establishment Category	4		4
Establishment Type	4		4
Fax Number	4		4
High Dependency Unit Beds	4		4
Hospital Group	4		4
Inspection & Registration Agency	4		4
Intensive Care Unit Beds	4		4
Location by County/Unitary Authority	4		4
Managing Company	4		4
Notes	4		
Operating Theatres	4		4
Owner Name	4		4
Patient Type	4		
Primary Care Trust	4		4
Primary Patient Type	4		4
Region	4		4
Sector	4		4
Services & Facilities	4		
Unique Record Number	4		4
User Flag	4		
Website	4		4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Hospitals, Hospices & Clinics (Cont)			
Selecting one or more of the contact type fields below will extract only the names of the contact. In order to obtain their job titles then Contact Job Title will also need to be selected			
Administration Manager	via Contact Type		4
Admissions Manager	via Contact Type		4
Building/Estate Manager	via Contact Type		4
Business Development Director	via Contact Type		4
Finance Director	via Contact Type		4
Health & Safety Manager	via Contact Type		4
Hospital/Clinic Chairperson	via Contact Type		4
Hospital/Clinic Director	via Contact Type		4
Hotel Services Manager	via Contact Type		4
Human Resources Director	via Contact Type		4
IT Manager	via Contact Type		4
Marketing Manager	via Contact Type		4
Materials Manager	via Contact Type		4
Medical Director	via Contact Type		4
Nursing Director	via Contact Type		4
Private Patients Manager [3]	via Contact Type		4
Purchasing Manager	via Contact Type		4
Quality Assurance Director	via Contact Type		4
Registered Manager	via Contact Type		4
Risk Manager	via Contact Type		4
[3] *this contact is only available for Private Patient Units*			

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Hospital & Clinic Groups			
Group Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name [1]	4		4
Primary Contact Name [2]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
Contact Type	4		4
[1] *when selected, this will extract the name of all senior manager contacts in the group. You will not need to select the Primary Contact Name*			

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Hospital & Clinic Groups (Cont)			
[2] *when selected, this will extract the main contact for the group, which is invariably the Managing Director or Chief Executive, but not always*			
Beds Managed	4		4
Beds Owned Leased or Managed	4		4
Category	4		4
Clinics Managed	4		4
Clinics Owned, Leased or Managed	4		4
Email	4		4
Fax Number	4		4
Hospitals Managed	4		4
Hospitals Owned, Leased or Managed	4		4
Notes	4		
Region	4		4
Sector	4		4
Unique Record Number	4		4
User Flag	4		
Website	4		4
Selecting one or more of the contact type fields below will extract only the names of the contact. In order to obtain their job titles then Contact Job Title will also need to be selected			
Administration Manager	via Contact Type		4
Admissions & Contracts Officer	via Contact Type		4
Business Development Director	via Contact Type		4
Company Chairman	via Contact Type		4
Finance Director	via Contact Type		4
Homes Admissions Contact [3]	via Contact Type		4
Human Resources Director	via Contact Type		4
Managing Director/Chief Executive	via Contact Type		4
Marketing Manager	via Contact Type		4
Nursing Director	via Contact Type		4
Operations Director	via Contact Type		4
Purchasing Manager	via Contact Type		4
Quality Assurance Director	via Contact Type		4
Training Director	via Contact Type		4
[3] *this contact is only available for groups that also operate care homes*			
Financial Information			
Organisation Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Financial Information (Cont)			
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name [1]	4		4
Primary Contact Name [2]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
Contact Type	4		4
[1] *when selected, this will extract the name of all senior manager contacts in the group. You will not need to select the Primary Contact Name*			
[2] *when selected, this will extract the main contact for the group, which is invariably the Managing Director or Chief Executive, but not always*			
Category	4		4
Core Business	4		4
Email	4		4
Fax Number	4		4
Notes	4		
Region	4		4
Sector	4		4
Unique Record Number	4		4
User Flag	4		
Website	4		4
Selecting one or more of the contact type fields below will extract only the names of the contact. In order to obtain their job titles then Contact Job Title will also need to be selected			
Administration Manager	via Contact Type		4
Business Development Director	via Contact Type		4
Business Owner/Proprietor	via Contact Type		4
Company Chairman	via Contact Type		4
Finance Director	via Contact Type		4
Home Admissions Contact	via Contact Type		4
Human Resources Director	via Contact Type		4
Managing Director/Chief Executive	via Contact Type		4
Marketing Manager	via Contact Type		4
Operations Director	via Contact Type		4
Purchasing Manager	via Contact Type		4
Quality Assurance Director	via Contact Type		4
Training Director	via Contact Type		4

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Inspection & Registration Agencies			
Local Office Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name	4		4
Primary Contact Name [1]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
[1] *when selected, this will extract the main contact for the local office, which is invariably the senior manager, but not always*			
Authority Type	4		4
Notes	4		
Region	4		4
Unique Record Number	4		4
User Flag	4		
Care Commissioners (Social Services)			
Commissioning Authority Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name	4		4
Primary Contact Name [1]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
Contact Type	4		4
Notes	4		
Region	4		4
Unique Record Number	4	4	4
User Flag	4		
[1] *when selected, this will extract the main contact for the care commissioning unit, which is invariably the Senior Contracting Officer, but not always*			

Database & Field Names	Searchable Fields	Exportable Fields in Enhanced Version	Exportable Fields in Complete Version
Care Commissioners (Social Services) (cont)			
Selecting one or more of the contact type fields below will extract only the names of the contact. In order to obtain their job titles then Contact Job Title will also need to be selected			
Administration Manager	via Contact Type		4
Adult Services Contracting Officer	via Contact Type		4
Children's Services Contracting Officer	via Contact Type		4
Contracting/Commissioning Officer	via Contact Type		4
Domiciliary Services Contracting Officer	via Contact Type		4
Learning Disabilities Contracting Officer	via Contact Type		4
Mental Health Contracting Officer	via Contact Type		4
Physical Disabilities Contracting Officer	via Contact Type		4
Senior Contracting/Commissioning Officer	via Contact Type		4
Specialist Services Contracting Officer	via Contact Type		4
Primary Care Trusts & Health Boards			
Primary Care Trust Name	4	4	4
Address Line 1	4	4	4
Address Line 2	4	4	4
Town	4	4	4
County	4	4	4
Postcode	4	4	4
Telephone Number	4	4	4
Contact Name	4		4
Primary Contact Name [1]	4	4	4
Contact Salutation	4	4	4
Contact Job Title	4	4	4
[1] *when selected, this will extract the main contact for the primary care trust, which is invariably the Chief Executive, but not always*			
Notes	4		
Region	4		4
Unique Record Number	4		4
User Flag	4		

Appendix 2

Using Exported Data

These notes only provide basic guidance for users on handling data exported from Care*Search*, and cannot advise you on the use of your chosen mail merge, database or other software application.

Care*Search* users are requested to consult their local managers or software user manual for further help in using exported data.

Format of Exported Data

Data can be exported from Care*Search* as text files with the file extensions 'txt' or 'csv'. These formats are very basic and because they are standard across almost of all computers and mail systems, the files are easy to use in most common office software programs, whether word processing packages, spreadsheets or databases. The files only include upper and lower case letters, numbers, and standard punctuation marks.

The only difference between a txt file and a csv file is the csv file extension, and if you click on a csv file it will open automatically in Excel.

For the technically minded, these text files are called ASCII comma-separated text-delimited files, or **comma-separated text files** for short. ASCII stands for American Standard Code for Information Interchange. These files are most easily viewed and edited in text editors such as NotePad or WordPad.

Comma-separated means that the data in each line or record in the text file, which relate to different fields in Care*Search,* are separated by commas, and text-delimited means that any text within these fields is surrounded by a delimiter or qualifier, usually quotation marks, to make sure that any characters in the text, such as commas, are not confused with the commas used to separate the fields. Figures in text files are not usually qualified by quotation marks, and are only separated from adjacent fields by commas.

A typical example of a line of data in a comma-separated text file is:

12345,"Ann Brown","Manager","The Conifers Residential Home","Downside Way","Easton", "BG2 7HN"

How is the Data to be Used?

A text file can be used in a number of ways:

- you can quickly check that the exported records and fields are as you expected by opening the file in a suitable text reader such as Notepad or WordPad as explained in **Looking at the Data** below

- the file can be opened easily in Excel and saved as an Excel file as explained in **Opening & Saving the Data in Excel** below

- you can use the file as it stands to do a simple mail merge in Word. To do this you need to be familiar with Word and mail merging. The stages are explained in **Using the Data directly for a Mail Merge** below

- if you want to do an extensive mail merge, analyse the data, further select or sort the data, or simply view the data in a structured table, then the data will have to be imported into a database like Access, as explained in **Importing the Data into a Database** below

Looking at the Data

You can open a text file in WordPad in several ways:

- double click on a txt file in Windows Explore (though a csv file will open in Excel, and small txt files will automatically open in NotePad, a simpler version of WordPad)

- drag and drop the text file in Windows Explorer onto a shortcut to WordPad on your desktop or task bar

- open WordPad and then use File/Open from the menu bar to select the text file from Files\Laing & Buisson\CareSrch\Userdata

The contents of the file are then displayed immediately on screen, and each record remains in one long line with the fields separated by commas.

If you open the file in Word, long records will not stay in a single row but will wrap onto the next line, according to the format of the page, so the data will appear mixed up and make it difficult to check the file.

Opening & Saving the Data in Excel

Text files can be opened in Excel very easily, and as has already been said, the only difference between a txt file and a csv file is the file extension at the end and the fact that if you click on a csv file it will open automatically in Excel. To change from one to the other, you simply rename the file as explained in (a) below.

Csv files are also called comma-separated value or variable files and like txt files, each record is a single line, and each field in the record is separated by a comma. The csv file type is often associated with Microsoft Excel as it is easy to view the data in a spreadsheet by double-clicking on the file. The file can then be saved as an Excel file. This file type is also highly suitable for sending data by email, as it is only 25% of the size of the equivalent data in Excel.

Csv and txt files can be opened and saved in Excel as follows:

(1)   open Windows Explorer, and locate the file wherever you have saved it. If the file is a txt file, change the file extension txt at the end of the file name to csv either by (a) selecting the file, and then gently clicking once inside the highlighted file name so that it is activated and can be edited, or alternatively by (b) right clicking on the file and selecting Rename eg. homes.txt is renamed to homes.csv. Then click Yes to confirm the change.

Although you can open a txt file in Excel, it is a little complicated as explained in (3) below, so it is easier to change the txt file into a csv file.

(2)   double click on the file, which will then automatically open in Excel with each field of data in a separate column. The column widths are set to a default size, but you can view more of the data in each column by widening the columns as necessary. Go to step (4). If for some reason, the file does not open in Excel, go to step (3)

(3)   if the file does not open in Excel, then open Excel itself, select File, and then select Open to display the Open dialog box. In the Files of Type field at the bottom of the box, select Text Files (*.prn; *.txt; *.csv), and then locate the csv file wherever you have saved it, and then click on Open. The file should then open in Excel with each field of data in a separate column. The column widths are set to a default size, but you can view more of the data in each column by widening the columns as necessary

(4)   go to File on the menu bar, *select* Save from the File drop down menu, and in the Save As dialog box, *select* Excel Workbook or Worksheet (xls) in the 'Save as Type' field, and *click* Save.

The data will now have been saved as an Excel file with the same name and in the same location as the original csv file.

Using the Data directly for a Mail Merge

If the data is to be used to create form letters and/or mailing labels then the exported text file can be used directly as the data source file. The basic steps of a typical mail merge are:

- write/create the form letter or mailing labels within the mail merge facility in your word application

- you will then be prompted to select the source of the data you wish to use. Select your exported text file as the data source, remembering to select 'Text Files' in the 'Files of Type' field in the File Open dialog box

- you will then be prompted to insert the fields to be merged into the document or label by whatever method is used in your particular word application. The field names are in the first row of the text file and it is this row that your application will look at in order to offer you the list of fields for insertion into your mail merge document

- the final stage is to merge the records to the form letter or mailing label, and then print off the result

Importing the Data into a Database

If you want to do an extensive mail merge, analyse the data, further select or sort the data, or simply view the data in a structured table, then the data will have to be imported into a database. The exported text file can be imported into most common databases as follows:

- *create* a new database file or table on your hard drive (C) if you are not going to use an existing database

- *open* the database window of the new or existing database or table *****

- *select* Open File, Import File, or Get External Data or similar commands from the File menu or other appropriate menu

- *select* the text file in the dialog box that is displayed

- *select* whether you want to download the data into the new or an existing database

- decide at some point whether you want the first row of data to form the field names of the columns in your database. There should be an option that allows you to choose. Invariably you will want to use the field names in your database. If so, *select* the option.

- click OK. The data is automatically imported into the database

 * *Many applications have import wizards or utilities which allow you to import the data by following the on-screen instructions*

Once the data has been imported into a database you will be able to view the data, and select or analyse records by using appropriate queries. Further advice on using queries should be available in your software user manual.

Appendix 3

Field Descriptions & Notes

Help notes have been provided in Care*Search* for most of the information (or data fields) in the Care Homes database, and are included here. Help notes for the fields in the other databases are not yet on the Care*Search* CD, but are included in this appendix. These notes provide a description or explanation of the data in the field, and how that data can best be used in searches.

The data fields available on Care*Search* are listed below in alphabetical order. Many fields are common to all databases. Where a field is only found on one or two databases then this is indicated against the field name. Where the values in a field that is found in more than one database are different in some important respect then separate notes are given for each field.

Entries have also been included on other care and health records that do not appear in CareSearch, or information which does not appear as fields on CareSearch, but which users may look for.

Address Lines 1 and 2

Address Lines 1 and 2 may be empty. For example, a small care home known as 1 Alexandra Street, Stone, Staffordshire would have '1 Alexandra Street' entered in the Home Name field and 'Stone' entered in the Town field.

The nearest place name to the establishment other than the Town will be in Address Line 2, which can also include other parts of the address where the address is long.

To identify establishments with an empty Address (or any other) field: select the Address (or any other) field in the relevant Search Form; click on the logical operator to the left until it changes from And to Not; enter a wild card character (* or %) as the selection criterion in the white search criteria/values box; and click on Find as usual. The search will return all establishments where the selected field is empty.

Adult Placement Homes

As information about adult placement homes is not in the public domain, these homes are not included in the Care Homes database. Also see Registration Type

All Contacts (Financial Information)

The contact name of a senior manger in an organisation that is included in the Financial Information database. The name includes the title (where available), forename or initial, and surname. All senior manager in an organisation are included in this field. The positions held by senior managers are given in the Job Title field (qv).

Authority Type (Inspection & Registration Agencies)

Generally there is only a single type, Care Standards Local Office, which are the local offices of the Commission for Social Care Inspection in England, the regional offices of the Scottish Commission for Regulation of Care and the Care Standards Inspectorate for Wales, the Health and Social Services Boards in Northern Ireland, and office of the Isle of Man Government. Currently the head office of the Healthcare Commission is included as a Care Standards Head Office pending the assigning of independent healthcare establishments to the regional offices of the Commission.

Baseline Fees (Care Commissioners Social Services)

These are the weekly amounts that each local authority is prepared to pay to care homes for nursing care or personal care, and the information is derived from Laing & Buisson's annual survey of local authorities in late Spring each year, after authorities have fixed their rates for the new financial year. In many cases, a local authority will pay different amounts to different types of client, and may also set different rates to reflect degrees of dependency, or the quality of care provided. These are translated by Laing& Buisson into minimum and maximum rates. The terms nursing homes and residential homes used in the fee tables have been superseded by the terms nursing care and personal care respectively

Beds Managed (Care Home Groups, Hospital & Clinic Groups)

This is the total number of beds in the establishments that are managed by a group, but not owned, as distinct from establishments that are owned or leased by the group.

Beds, Number of (Hospitals)

This is the total number of registered overnight beds in the hospital. Day places are not included.

Beds Owned, Leased or Managed (Care Home Groups, Hospital & Clinic Groups)

This is the total number of beds in the establishments that are owned, leased or managed by a group. An establishment that is owned by one group and managed by another is therefore included in the total for each group.

Beds/Places, Number of (Care Homes)

This is the total number of registered beds in the care home. Beds that are temporarily unavailable for use are included. Day places are not included.

Care Commissioners (Social Services) (Care Homes, Hospitals)

This field comprises the 209 local authorities with responsibility for the commissioning and contracting of care in the UK as follows:

- county councils in England

- unitary authorities within the boundaries of county councils in England

- metropolitan district and borough councils within Greater London and the area of the former Metropolitan Counties

- unitary authorities in Scotland and Wales

- the four joint health and social services boards in Northern Ireland

- the Isle of Man Government

The Isles of Scilly Council is treated as a unitary authority, although the care contracting function is handled by the Cornwall County Council office in Truro. The Channel Islands are not included.

Care Home Beds Managed (Care Home Groups)

This is the total number of care home beds that are managed by a group, but not owned, as distinct from the beds in care homes that are owned or leased by the group.

Care Home Beds Owned, Leased or Managed (Care Home Groups)

This is the total number of care home beds that are owned, leased or managed by a group. The beds in a care home that is owned by one group and managed by another are therefore included in the total for each group.

Care Home Group (Care Homes)

Care Home Groups are defined by Laing & Buisson as organisations, partnerships or individuals that own or lease 3 or more care homes of 4 beds or more which:

- provide care for older people or people with physical disabilities, *or*

- provide care for people with learning disabilities, with mental illness, or with substance dependencies

In addition, all publicly quoted companies with any care home holdings at all are included, regardless of the number of homes.

The Owner displayed in a home's details may be a subsidiary or affiliate of a Care Home Group. If so, the Owner name in the Record Detail is underlined in blue with a hyperlink to the Care Home Group that is the ultimate owner.

Where the care homes operated by a group are owned by an individual, or individuals in a partnership, then in order that they can be treated as a care home group for search and listing purposes, Laing & Buisson's convention is to name the group after the surname of the most predominant individual eg. if Dr Jones, Ms Jones, Mrs Evans and Miss Thomas together own three homes, they would be called the Jones Group. A care home group of this name will not therefore actually exist.

A search of the Care Homes database by Care Home Group will return homes either owned/leased or managed by that Group. To find which of a Group's homes are operated under management (i.e. not owned or leased) select the Group in the Care Home Groups database. The homes display option at the foot of the Group's details will identify those homes that are managed only.

To find establishments which are neither owned nor managed by a Care Home Group: go to the Care Homes Search Form; select the Care Home Group field; click on the logical operator to the left until it changes from AND to NOT; enter a wild card character (* or %) as the selection criterion in the white box; and click on Find as usual. The search will return all care homes that are not operated by a Care Home Group. This search can take some time.

Care Homes Managed (Care Home Groups)

This is the total number of care homes that are managed by a group, but not owned, as distinct from the care homes that are owned or leased by the group.

Care Homes Owned, Leased or Managed (Care Home Groups)

This is the total number of care homes that are owned, leased or managed by a group. A care home that is owned by one group and managed by another is therefore included in the total for each group.

Category (Care Home Groups, Financial Information, Hospital & Clinic Groups)

Groups are classified by category, which is the organisation's ownership type within the market sector, and it is a further sub-division of the sector (qv). With the exception of publicly quoted companies and local authority providers, provider organisations must operate at least three care homes or two hospitals or other independent healthcare establishments to be treated as a group, and hence included in Care*Search*.

Eleven categories are currently in use:

For Profit (Private Sector)

- UK Publicly Quoted Company or Subsidiary - these are companies quoted on the Stock Exchange or the Alternative Investment Market (AIM)

- Non-UK Publicly Quoted Company or Subsidiary - these are companies quoted on overseas exchanges)

- Private Company - these companies may be 'Ltd' or 'plc', but are not publicly quoted)

- Non-UK Private Company

- Partnership or Individual Owned - these are not companies, and have the name or names of individuals, or individuals in a partnership, as owners. In order that they can be treated as a care home group for search and listing purposes, Laing & Buisson's convention is to name the group after the surname of the most predominant individual eg. if Dr Jones, Ms Jones, Mrs Evans and Miss Thomas together own three homes, they would be called the Jones Group. A care home group of this name will not therefore actually exist

- Provident Association or Subsidiary. BUPA is only the major provider in this category. However although it is a non-profit making provident association, its subsidiaries which operate care homes and hospitals are profit making, and are treated as being in the private sector

Not for Profit (Voluntary and Public Sector)

- Non Profit Organisation - these are registered charitable or voluntary organisations

- Organisation Formed to Operate Former Local Authority Homes - these are private companies that are operate former local authority homes

- Local Authority Provider

- NHS Provider

- Mutual Company - these are companies that are owned by their policy holders

Charges - see Daily Charge Maximum and Maximum (Hospitals), or Nursing Care Room Fee and Personal Care Room Fee (Care Homes)

Children's Homes

As information about children's homes is not in the public domain, these homes are not included on Care*Search*.

Client Type (Care Homes, Hospitals)

This edition of Care*Search* uses the client types (or service users) adopted by the Commission for Social Care Inspection (CSCI), which took over responsibility for the registration and inspection of care homes in England from the National Care Standards Commission (NCSC) on 1 April 2004. Pending receipt of full information from the other regulatory bodies in Scotland, Wales and Northern Ireland, the CSCI registration types have been used, together with a small number of specialist client types such as Brain Injury Rehabilitation, and some client types that may be in use other than in England eg. Social/Behavioural Difficulties.

The client types are shown in the Client Types box in the care home's Record Detail together with the number of places for each client type where this information has been obtained. The total number of places for all client types may exceed the Total Registered Places figure since the client places are only the maximum number of places for which the home is registered to provide that type of care, not the actual number of clients at any one time

To use Care*Search* to estimate capacity statistics, see the help notes for the Primary Client Type field.

Some client types may cross over registration categories. For example, Brain Injury Rehabilitation may be provided in a Care Home, Independent Hospital or Independent Clinic. Another example is Drug Dependence Care, Rehabilitation or Treatment that can also be provided for in a Care Home, Independent Hospital, or Independent Clinic. In order to accommodate such cross over, a search in the Care Homes Search Form will return, in addition to Care Homes, any Independent Hospitals or Clinics catering for those client types. Conversely, a search in the Hospitals, Hospices and Clinics Search Form will return Care Homes catering for those client types as well.

Some hospitals also appear in the Care Homes database because the client types eg. Psychiatric Rehabilitation, Physical & Medical Rehabilitation, are associated with long term care.

If you wish to confine searches to care homes only, you should look up the index of the Registration Type field in the Care Home Search Form, select the care home categories you want, or alternatively select Hospitals with NOT as the operator.

Unlike other fields that are not exportable because there are multiple occurrences of data for any one care home, as in the Services & Facilities field, the multiple client type descriptions in the Client Type field can be exported into a single field (for further information see Exporting Data in the main part of the User Guide).

Clinics Managed (Hospital & Clinic Groups) *(text in course of preparation)*

Clinics Owned, Leased or Managed (Hospital & Clinic Groups) *(text in course of preparation)*

Commissioning Authority (Care Commissioners Social Services) *(text in course of preparation)*

Consulting Rooms (Hospitals) *(text in course of preparation)*

Contact Name (Care Home Groups, Hospital & Clinic Groups, Hospitals, Inspection & Registration Agencies, Care Commissioners, Primary Care Trusts) *(text in course of preparation)*

Contact Job Title (Care Home Groups, Hospital & Clinic Groups, Hospitals, Inspection & Registration Agencies, Care Commissioners, Primary Care Trusts) *(text in course of preparation)*

Contact Type (Care Home Groups, Hospital & Clinic Groups, Hospitals, Care Commissioners) *(text in course of preparation)*

Contact names are not necessarily available in any one record for all contact types, and this applies particularly to the smaller establishments or groups eg. the smaller care home groups will most likely have a managing director or chief executive, a finance director, an administration manager, but they are unlikely to have a business development director or human resources director as well.

Core Business (Financial Information)

This refers to the principal function of the business within the care and health sector (see *Criteria for Inclusion in the Database* in the Financial Information section of the User Guide for full details). Many businesses have multiple functions. For example a care home group that operates fifty care homes may also own three psychiatric hospitals. However the business will only be listed as a care home group, its core business, and will not be listed twice. However the Record Detail page for the business will include information about its activities in the sector and have links to all its care homes, hospitals etc.

Where a business is no longer operating as a principal company, but has recent financial accounts, '(Not/No longer operating as a principal company)' is added to the core business description.

County

Although the county may be used as part of a mailing address, there is no requirement by the Royal Mail to do so. The counties in this field use the historic or geographical counties of England, Scotland, Wales and Northern Ireland, but include the former metropolitan counties of England, but exclude the unitary authorities of England. This field is very useful for searching for records within a recognisable area of the country of smaller size than the regions in the Region field, without having to take account of varied local government boundaries.

More exact searches can be carried out using the Location by County or Unitary Authority field, taking care to include if necessary any unitary authorities which are located within the boundaries of a county eg. Peterborough City Council lies within the geographical area of Cambridgeshire County Council.

No counties are given for the major metropolitan areas of London, Belfast, Bristol, Edinburgh, Glasgow and Manchester, as these cities do not lie in county areas or are not generally associated with counties.

It is therefore important to include these cities, as appropriate, in the Town field with the OR operator. For example, you would need to enter Manchester in the Town field as well as entering Greater Manchester in the County field if you wanted to find all records within the geographical area of Greater Manchester.

The geographical areas covered by these counties are shown in the County Map at the end of this appendix.

In order to provide consistency in the assigning of towns to counties, the following towns are treated as being in Greater Manchester, although some of the towns themselves are in historical Lancashire: Altrincham, Ashton under Lyne, Bolton, Bury, Cheadle, Hale, Hyde, Leigh, Oldham, Rochdale, Sale, Salford, Stockport, Stretford, Tameside, Trafford, Wigan

Currency of Daily Room Charges (Hospitals) *(text in course of preparation)*

Currency of Fee Information (Care Homes)

This field gives the date that a home most recently responded to a Laing & Buisson survey and provided information about their weekly fee rates, or the currency of weekly fee data obtained from other sources. Generally, fee data that is more than two years old is excluded as will be indicated by the dates in the index for this field. The date of currency of the fee data is displayed in the last row of the Weekly Fees box in the Record Detail for a home. Only homes with weekly fee data will be selected in searches on this field.

You can select homes with weekly fee data for a specific currency date, or homes with weekly fee data within a range of 'currency' dates, as follows:

01/04/2002	Currency of weekly fee data exactly 1 April 2002
>=01/04/2002	Currency of weekly fee data on or later than 1 April 2002
>01/04/2002	Currency of weekly fee data later than 1 April 2002
<>01/04/2002	Currency of weekly fee data not 1 April 2002
<01/04/2002	Currency of weekly fee data earlier than 1 April 2002
<=01/04/2002	Currency of weekly fee data on or earlier than 1 April 2002

These may be combined with the additional operators ',' AND and '|' OR

e.g. entering <01/04/2002|>01/01/2003 returns homes with weekly fees that have a currency date earlier than 1 April 2002 or later than 1 January 2003, and entering >=01/04/2002, <01/04/2003 returns homes with weekly fees that have a currency date between 1 April 2002 and 31 March 2003.

Daily Charge Maximum (Hospitals) *(text in course of preparation)*

Daily Charge Minimum (Hospitals) *(text in course of preparation)*

Day Places (Care Homes, Hospitals)

This is the number of day places available in the care home or hospital. You can select establishments with a specific number of day places, or establishments within a range of place numbers, for example:

50	Day places equal to 50
>=50	Day places greater than or equal to 50
>50	Day places greater than 50
<>50	Day places not equal to 50
<50	Day places less than 50
20-50	Day places between 20 and 50
<=50	Day places less than or equal to 50

These may be combined with the additional operators ',' for AND '|' for OR

e.g. entering <10|>30 in 'Day Places' returns establishments with less than 10 or more than 30 day places entering >10,<12 returns establishments with 11 day places. Establishments with no current information on day places will not be returned in searches on the day places field.

Dedicated Cardiac Theatres (Hospitals) *(text in course of preparation)*

Dedicated Day Theatres (Hospitals) *(text in course of preparation)*

Descriptive Text (Care Home Groups, Financial Information, Hospital & Clinic Groups, Hospitals) *(text in course of preparation)*

Dual Registered Home - see Former Dual Registered Home

Email

This is the main email address of the home that appears under General Enquiries in the Contact Information box in the Record Details for each home. It is a searchable field, but to avoid 'spamming' it cannot be exported.

The Admissions and Contracts email address of the home, if different, is also displayed in the Contact Information box in the Record Details. This may sometimes be the email address of an admissions contact at the Care Home Group that operates the care home. The Admissions and Contracts email address is neither searchable nor exportable**.**

En-Suite Rooms (Care Homes) *(text in course of preparation)*

Establishment Name (Hospitals) *(text in course of preparation)*

This is the name of the hospital, hospice, clinic or other independent healthcare establishment. In a few cases, the names are given as the street number and street name only; there is no other name. Where the establishment is an NHS hospital with a private patients ward or wing, the name of the ward etc is given after the name of the hospital. In the case of hospitals owned by groups (with the exception of Nuffield Hospitals), the name of the group is invariably the first part of the name eg. BUPA, BMI, Capio, Marie Curie, [The] Priory.

Establishment Type (Care Homes, Hospitals) *(text in course of preparation)*

Fax Number

The main fax number for the establishment or head office beginning with the full area code. The local number, if it consists of seven or eight digits, is split into groups of three or four digits.

Fees (Care Homes) - see Nursing Care Room Fee and Personal Care Room Fee

First Registration Date (Care Homes)

This is the date that the care home was first registered. Where it has not been possible to obtain an exact date, a notional mid-year date eg. 01 July 19XX or 20XX has been used. This date will not be affected by the new registration of a home eg. due to change of ownership

Former Dual Registered Home (Care Homes)

These are homes that were formerly registered both as nursing homes and as residential care homes i.e. dual-registered, and this is indicated in the Record Detail of these care homes by '(former Dual Registered Home)' appearing below 'CARE HOME WITH NURSING' at the top of the page

This form of registration ceased in April 2002 with the introduction of new registration types by the National Commission for Care Standards (which was superseded by the Commission for Social Care Inspection (CSCI) in April 2004), and the other care standards agencies.

The vast majority of care homes are now either classified as Care Homes Only or Care Homes with Nursing, and this latter classification includes both care homes where all the beds are dedicated to nursing care, and care homes where only some of the beds are dedicated to nursing care (as would be the case with dual-registered homes). Although these former dual-registered homes can no longer be identified by the new classification alone, these homes can however be selected by entering **DR** in the Former Dual Registered Home search field. It is also unlikely that these formally dual-registered homes will have stopped providing personal care since the change of classification.

Another way of identifying Care Homes with Nursing that also provide personal care is to select care homes that have fees for personal care eg. enter Care Homes with Nursing in the Registration Type field, and enter the wild card ***** in the Personal Care Minimum Single Room Fee field (qv) to select any occurrence of fees in this field for these homes. All the homes in the search results are very likely to provide personal care as well as nursing care.

Group Name (Care Home Groups, Hospital & Clinic Groups) *(text in course of preparation)*

High Dependency Unit Beds (Hospitals) *(text in course of preparation)*

Home Name (Care Homes)

This is the name of the care home. The names of many homes are given as the street number and street name only; there is no other name. This applies particularly to 'community' homes, which may be homes for people with learning disabilities or with mental health needs, and where the establishment is not seen as an institution, but as a home. This is the reason why in summary lists (search results), care homes that are named by the street number and street name appear first. In a few cases, the name may be that of the organisation operating the home

Hospital Group (Hospitals) *(text in course of preparation)*

Hospitals Managed (Hospital & Clinic Groups) *(text in course of preparation)*

Hospitals Owned, Leased or Managed (Hospital & Clinic Groups) *(text in course of preparation)*

Inspection & Registration Agency (Care Homes)

In the Care Homes database, this field contains the local or regional offices of the agencies responsible for regulating care homes under the Care Standards Act 2000, which came into force in April 2000, and the 89 records consist of:

- 71 local offices in England operated by the Commission for Social Care Inspection (CSCI), which took over responsibility for the registration and inspection of care homes from the National Care Standards Commission (NCSC) on 1 April 2004

- 8 regional offices in Wales operated by the Care Standards Inspectorate for Wales (CSIW)

- 5 regional offices in Scotland operated by the Scottish Commission for Regulation of Care (SCRC)

- 4 Health and Social Services Boards are responsible for care home regulation in Northern Ireland

- the Isle of Man Government is responsible for care homes in the Isle of Man.

However because a number of hospitals are included in this database because their client types cross over establishment type or registration type categories (qv), the head office of the Healthcare Commission (pending the assigning of hospitals to the regional offices of the Commission), is also listed.

The Channel Islands are not included.

Inspection & Registration Agency (Hospitals)

In England, the Healthcare Commission is responsible for regulating independent healthcare establishments ie. hospitals, hospices, clinics etc., but pending the assigning of establishments to the regional offices of the Commission, only the head office of the Commission is currently listed. In Scotland, Wales, Northern Ireland, and the Isle of Man Government, the care standards agencies are the same as those for care homes (see Inspection & Registration Agency (Care Homes)), so these are listed

However because a number of care homes are included in this database because their client types cross over establishment type or registration type categories (qv), the local offices of the Commission for Social Care Inspection (CSCI) are also listed.

The Channel Islands are not included.

Intensive Care Unit Beds (Hospitals) *(text in course of preparation)*

Job Title (Financial Information) *(text in course of preparation)*

Languages (Care Homes)

Information on languages spoken by members of staff working at care homes is derived from responses to regular Laing & Buisson surveys.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide information on languages spoken by members of staff. The information contained in the languages field is the most recent available from Laing & Buisson surveys. Those homes with no current information on languages spoken will not be returned in searches on the languages field.

Because of staff turnover, the currency of information on languages spoken by members of staff can be short-lived and Care*Search* users should interpret the information accordingly.

Local Office (Inspection & Registration Agencies) *(text in course of preparation)*

Location - please select

This field provides a convenient drop down list of fields that can be used for searches by location eg. Location by County/Unitary Authority, Location by District Authority, Town, Postcode, County, Region. The fields in the list vary according to the particular database.

Location by County or Unitary Authority (Care Homes, Hospitals)

This field represents geographical areas based on the first tier of local government in England and Northern Ireland, and the unitary authorities in Scotland, Wales. These areas are currently the same as those listed in the Care Commissioners field with two differences. Whilst each care commissioner has a record of contact and address details (and baseline fees), the location by county or unitary authority names are simply search values. However selecting one or more of names in the Location by County or Unitary Authority field will restrict the index in the Location by District Authority field to the district and non-metropolitan borough councils, where they exist, within that area. This only applies however to the county council areas in England and the joint health & social services boards in Northern Ireland which have a second tier of local government.

There are 209 areas in the Location by County or Unitary Authority field and these match the local authorities that have responsibility for social services as follows:

• county councils in England

• unitary authorities within the boundaries of county councils in England

• metropolitan district and borough councils within Greater London and the area of the former Metropolitan Counties

• unitary authorities in Scotland and Wales

• joint health and social services boards in Northern Ireland

• the Isle of Man Government

The Isles of Scilly Council is treated as a unitary authority, although care contracting is managed by the Cornwall County Council office in Truro. The Channel Islands are not included.

When searching in this field, take care to specify the inclusion or otherwise of unitary authorities which are located within the boundaries of a county eg. Peterborough within Cambridgeshire.

If you select beforehand, as part of your search, the region from the Region field in which local authority that is of interest to you is located, and add that region to the search, this will restrict the index in the Location by County or Unitary Authority field to the county or unitary local authorities within that region.

For less exact searches within the recognisable historic or geographical counties of England, Scotland, Wales and Northern Ireland, where you don't need to take account of varied local government boundaries, use the County field.

Location by District Authority (Care Homes)

This field represents geographical areas based on the second tier of local government in England and in Northern Ireland. These are the 264 local authorities that do not have responsibility for social services as follows:

• 238 districts or non-metropolitan borough councils in 34 counties in England

• 26 districts within the area of the 4 joint health & social services boards in Northern Ireland

There are no equivalent councils in Scotland and Wales, which only have unitary authorities.

The area of these councils, which cover a much smaller geographical area than the county councils, can therefore be used as an alternative search field to postcodes, at least in England and Northern Ireland.

If you select beforehand, as part of your search, the region or county council in which local authority that is of interest to you is located, and add that region or county council to the search, this will restrict the index in the Location by District Authority field to the district and non-metropolitan borough councils, where they exist, within that region or county council. This only applies to the selection of the 34 counties in England and 4 joint health & social services boards in Northern Ireland referred to above.

Unitary authorities within counties appear in the field list for the Location by County or Unitary Authority field, and not in the Location by District Authority field. This means that there are no districts in Berkshire, the East Riding of Yorkshire, Herefordshire, or in the Isle of Wight. The local authorities in Greater London and in the former Metropolitan Counties are all unitary authorities, and likewise do not appear in the Location by District Authority field.

Manager (Care Homes)

The individual who is the 'registered manager' of the care home under the Care Standards Act 2000. This may be the home manager, the person in charge, the matron etc.

Manager Job Title (Care Homes) *(text in course of preparation)*

Manager Salutation (Care Homes)

Manager salutation (e.g. Dear Mr Patel) enables users to personalise mailings to the Manager of the establishment.

Managing Company (Care Homes, Hospitals)

This field identifies the managing company of a care home or hospital if it is managed by one organisation and owned by another, and a list of these managing companies can be seen in the index.

Nursing Care Room Fees (Care Homes)

There are separate notes in this appendix for the personal care room fees (see Personal Care Room Fee). This note relates to Nursing Care Fees, and uses the Nursing Care Minimum Single Room Fee field as an example. The other three related fields are Nursing Care Maximum Single Room Fee, Nursing Care Minimum Shared Room Fee, and Nursing Care Maximum Shared Room Fee.

The nursing care minimum single room fee is the minimum single room fee for nursing care in £ per week, derived from responses to regular Laing & Buisson surveys. You can select homes with a specific fee rate, or homes within a range of fee rates, by entering criteria in the field as below:

Criteria	Searches For
400	Nursing Care Minimum Single Room Fees of exactly £400 pw
>=400	Nursing Care Minimum Single Room Fees greater than or equal to £400 pw
>400	Nursing Care Minimum Single Room Fees greater than £400 pw
<>400	Nursing Care Minimum Single Room Fees not equal to £400 pw
<400	Nursing Care Minimum Single Room Fees less than £400 pw
<=400	Nursing Care Minimum Single Room Fees less than or equal to £400 pw
400-500	Nursing Care Minimum Single Room Fees between £400 and £500 pw

These may be combined with the additional operators ',' AND, and '|' OR

e.g. entering <400|>500 in 'Nursing Care Minimum Single Room Fee' returns homes with fees less than £400 or more than £500 pw, and entering >499,<501 returns homes with fees of exactly £500 pw.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide fee information. The information contained in the fee fields is the most recent available from Laing & Buisson surveys. Those homes with no current fee information will not be returned in searches on fee fields.

You may do a fee search in association with date of currency. For example, to find care homes that have reported a 'Nursing Care Minimum Single Room Fee' of £500 per week or less, in April 2003 or later, you should:

In the Care Homes Search Form:

- select the 'Nursing Care Minimum Single Room Fee field

- enter '<=500' and click on Add

- select the Currency of Fee Information field

- enter '>=01/04/2003

- click on Find

Operating Theatres (Hospitals) *(text in course of preparation)*

Organisation Name (Financial Information) *(text in course of preparation)*

Owner (Care Homes)

The Owner may be an individual, a partnership or a corporate body that owns the freehold of the care home, hospital, hospice or clinic it under a long term lease. The Owner may be a subsidiary of a Care Home Group or Hospital and Clinic Group. In these cases, the Owner name in the Record Detail is underlined in blue with a link to the Care Home Group or Hospital and Clinic Group that is the ultimate owner.

In the case of the Care Homes database, the owners are invariably the same as the 'registered provider(s)' who are registered under Part II of the Care Standards Act 2000 as the person(s) 'carrying on' the care home.

The Owner field is not the best field to search for care homes owned by particular care home because the names are those of the 'registered provider' as stated on the care standards agency's registration record for each home, and will in many cases be different, if only slightly, from the correct name of the provider. In addition, the owner name can be that of a subsidiary company of a care home group. This is evident from the Owners index where there can be innumerable variations in the name given for the same care home group.

Whilst Laing & Buisson tries to standardise owner names as far as possible without significantly altering names, the names can change with each fresh registration. The Care Home Group field should therefore be used to search for the homes owned by specific care home groups.

Where an individual, or individuals in a partnership own three or more homes, in order that they can be treated as a care home group for search and listing purposes, Laing & Buisson's convention is to name the group after the surname of the most predominant individual eg. if Dr Jones, Ms Jones, Mrs Evans and Miss Thomas together own three homes, they would be called the Jones Group. A care home group of this name will not therefore actually exist.

Owner Name (Hospitals) *(text in course of preparation)*

Owner Salutation (Care Homes)

Owner Salutation (e.g. Dear Mr and Mrs Smith) enables users to personalise mailings to the owner of the care home. The field is maintained for all establishments owned by an individual or a partnership, or where the establishment is jointly owned by a corporate body and an individual. The field is empty where the establishment is solely owned by a corporate body.

An Owner Salutation field is not provided in the Hospitals, Hospices & Clinics database because these establishments are in the main not owned by individuals and all correspondence or contact is made with the hospital or clinic director.

Patient Type (Hospitals) *(text in course of preparation)*

Personal Care Room Fee (Care Homes)

There are separate notes in this appendix for the nursing care room fees (see Nursing Care Room Fee). This note relates to Personal Care Fees, and uses the Personal Care Minimum Single Room Fee field as an example. The other three related fields are Personal Care Maximum Single Room Fee, Personal Care Minimum Shared Room Fee, and Personal Care Maximum Shared Room Fee.

The personal care minimum single room fee is the minimum single room fee for personal care in £ per week, derived from responses to regular Laing & Buisson surveys. You can select homes with a specific fee rate, or homes within a range of fee rates, by entering criteria in the field as below:

Criteria	*Searches For*
400	Personal Care Minimum Single Room Fees of exactly £400 pw
>=400	Personal Care Minimum Single Room Fees greater than or equal to £400 pw
>400	Personal Care Minimum Single Room Fees greater than £400 pw
<>400	Personal Care Minimum Single Room Fees not equal to £400 pw
<400	Personal Care Minimum Single Room Fees less than £400 pw
<=400	Personal Care Minimum Single Room Fees less than or equal to £400 pw
400-500	Personal Care Minimum Single Room Fees between £400 and £500 pw

These may be combined with the additional operators ',' AND, and '|' OR

e.g. entering <400|>500 in 'Personal Care Minimum Single Room Fee' returns homes with fees less than £400 or more than £500 pw, and entering >499,<501 returns homes with fees of exactly £500 pw.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide fee information. The information contained in the fee fields is the most recent available from Laing & Buisson surveys. Those homes with no current fee information will not be returned in searches on fee fields.

You may do a fee search in association with date of currency. For example, to find care homes that have reported a personal care minimum single room fee of £500 per week or less, in April 2003 or later, you should:

In the Care Homes Search Form:

- select the Personal Care Minimum Single Room Fee field
- enter '<=500' and click on Add
- select the Currency of Fee Information field
- enter '>=01/04/2003'
- click on Find

You can also use the Personal Care Minimum Single Room Fee field to identify care homes previously regarded as 'dual-registered' homes before the reclassification of care homes under the Care Standards Act 2000. See Former Dual Registered Home for further information about these homes and how to identify them.

Postcode

Laing & Buisson's care and health services database contains up to date postcodes for virtually 100% of records. Users should be aware, however, that the last two characters of a postcode cannot necessarily be relied on. The last two characters derived from postcode databases may differ from those used by establishments themselves.

Searches for all establishments within a particular postcode area can be made using the initial letters of a postcode followed by the wild card character * (asterisk) eg. DT* will select all establishments with a Dorchester postcode, and DT5* will select all establishments within the DT5 postcode district.

Searches within consecutive postcode districts (the first part of a postcode) can be made using a postcode range eg. GU20..GU23 (two stops are entered without spaces between the two postcodes). This will select all establishments with the postcodes beginning GU20, GU21, GU22, and GU23. Searches in non-consecutive postal districts or of postcodes that begin with different letters can be made by separating each postcode search term with a | (the upper character of the forward slash key, called a pipe) which acts as an OR operator eg. CW5*|SY4*| SY13*|TF9* will select all establishments within the area of Whitchurch in north Shropshire.

Single Letter Postcodes

There are a number of postcode areas that commence with a single letter i.e. Birmingham (B), London East (E), Glasgow (G), Liverpool (L), Manchester (M), London North (N), Sheffield (S), and London West (W). If you use G* to search for records with a Glasgow postcode, this will also select records for Gloucester (GL) and Guildford (GU). To select establishments in postcode areas with only one postcode letter, enter the full numeric range for that postcode eg. G1..G99.

If you want to use a postcode range search and a postcode search using a wild card at the same time, you cannot do this in the same field. Select Postcode as another search field, and enter the search criteria using the OR operator on the second field as below:

AND   Postcode   EH*|DG*|TD*|KA*
OR   Postcode   G1..G99

Postcode Radius Search

Establishments can also be searched for within a given mileage radius of a postcode. If you enter the postcode EC1V 2PT in the postcode search field and enter 5 in the miles box at the end of the postcode search field, this will select all establishments within a 5 mile radius of the postcode. The postcode radius search will only work if a full postcode (including the space), and a miles radius figure, is entered as only a complete postcode can provide the fixed geographical point required for the search.

The postcode radius search is de-activated as soon as a wild card character or operator is entered in the adjacent postcode search field.

Primary Care Trust (Care Homes, Hospitals)

In England, local primary care trusts (PCTs) are responsible for deciding whether a nursing home resident is entitled to have the nursing element of care fees, as provided by a registered nurse, paid for by the NHS. This assistance is called the Registered Nursing Care Contribution

(RNCC), and the assessment of a person's entitlement to it, and to the level of RNCC payable, is carried out by a designated nurse in the PCT, the Lead Nurse. The management of the RNCC budget is done by a Nursing Home Co-ordinator, who also makes the financial arrangements for each person once the assessment has been completed by the Lead Nurse.

The Primary Care Trust field can be used to search for homes within primary care trusts in England, but more importantly each home record in Record Details also gives a link to the record of the relevant primary care trust, which gives the names of the Nursing Home Co-ordinator and the Lead Nurse, where they are available.

Primary Care Trust Name (Primary Care Trusts) *(text in course of preparation)*

Primary Client Type (Care Homes)

The current issue of Care*Search* uses the client types (or service users) adopted by the Commission for Social Care Inspection (CSCI), which took over responsibility for the registration and inspection of care homes in England from the National Care Standards Commission (NCSC) on 1 April 2004. Pending receipt of full information from the other regulatory bodies in Scotland, Wales and Northern Ireland, the CSCI registration types have been used, together with a small number of specialist client types such as Brain Injury Rehabilitation.

The primary client type is the client type for the largest number of persons for which the home is registered to provide that particular care or treatment, or where it is known from other sources that this is the predominant client type for which the home caters. Where no figure has been obtained for the number of places for each client type, Old Age, Dementia, Leaning Disabilities will usually take precedence in that order, as the primary client type, over other client types.

The client types are shown in the Client Types box in the care home's Record Detail together with the number of places for each client type where this information has been obtained. The total number of places for all client types may exceed the Total Registered Places figure since the client places are only the maximum number of places for which the home is registered to provide that type of care, not the actual number of clients at any one time.

Capacity Statistics

If you wish to estimate capacity statistics, you should search on the Primary Client Type field. For example, you could estimate the number of care home places for dementia in the West Midlands as follows:

In the Care Homes Search Form:

- select West Midlands in the Region field and click on Add

- select the Primary Client Type field, select Dementia from its index and click on Add

- click on Find;

- select Reports from the menu;

- select Summary Statistics and click on View

The number of places returned in the Summary Statistics Report will be lower than if you had selected Dementia from the Client Type field. This is because selection on the Client Type field will return ALL homes that cater for dementia, including homes where dementia is not the main client category. Selection on Primary Client Type, on the other hand, will return ONLY homes that cater primarily for dementia. This will give the best estimate of dementia places because the inclusion of non-dementia places in homes where Dementia is the Primary Client Type will usually be roughly balanced by the exclusion of dementia places in homes where Dementia is not the Primary Client Type.

Client Types Crossing Over Registration Categories

Some client types may cross over registration categories. For example, Brain Injury Rehabilitation may be provided in a Care Home, Independent Hospital or Independent Clinic. Another example is Drug Dependence Care, Rehabilitation or Treatment that can also be provided for in a Care Home, Independent Hospital, or Independent Clinic. In order to accommodate such cross over, a search in the Care Homes Search Form will return, in addition to Care Homes, any Independent Hospitals or Clinics catering for those client types. Conversely, a search in the Hospitals, Hospices and Clinics Search Form will return Care Homes catering for those client types as well.

Some hospitals also appear in the Care Homes database because the client types eg. Psychiatric Rehabilitation, Physical & Medical Rehabilitation, are associated with medium stay care.

If you wish to confine searches to care homes only, you should look up the index of the Registration Type field in the Care Home Search Form, select the home categories you want, or alternatively select Hospitals with NOT as the operator.

Primary Contact Name (Care Home Groups, Hospitals, Hospital & Clinic Groups, Inspection & Registration Agencies, Care Commissioners, Primary Care Trusts) *(text in course of preparation)*

Primary Patient Type (Hospitals) *(text in course of preparation)*

Purpose Built (Care Homes)

This indicates whether a home has been purpose built from the foundations up, and is newly built. Newly built is taken as built from 1987 onwards. Although there are older care homes that were purpose built, they would not be included by this definition. The index to this field shows Yes or No values:

Yes - which refers to homes that have been verified as purpose-built, and

No - which refers to homes that have been verified as not being purpose-built

This information appears in a care home's Record Details below Services & Facilities.

Those homes with no current information about whether or not the home is purpose built will not be returned in searches on the Purpose Built field.

Quality Assurance (Care Homes)

Information on quality assurance schemes operated at care homes is derived from responses to regular Laing & Buisson surveys.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide information on quality assurance schemes. The information contained in the Quality assurance schemes field is the most recent available from Laing & Buisson surveys. Those homes with no current information on quality assurance schemes will not be returned in searches on the Quality assurance schemes field.

Region

You can select from the regions of England, plus Scotland, Wales and Northern Ireland. When you select a region in the Region field, the index in the Location by County/Unitary Authority field will be restricted to county councils, metropolitan boroughs or unitary authorities within that region. The Channel Islands are not included.

The regions are the Standard Statistical Regions used by the Office of National Statistics. As a result, the area of Redcar and Cleveland, and Middlesbrough local authorities (which lay within

the former metropolitan county of Teeside) are in the North Region, and the area of North Lincolnshire and North East Lincolnshire local authorities (which lay within the former county of Humberside) are in the Yorkshire & Humberside Region.

The geographical areas covered by these regions are shown in the Region Map at the end of this appendix.

Registration Type (Care Homes)

In the care homes database, Care*Search* uses the registration types adopted by the Commission for Social Care Inspection (CSCI), which took over responsibility for the registration and inspection of care homes in England from the National Care Standards Commission (NCSC) on 1 April 2004. Pending receipt of full information from the regulatory bodies in Scotland, Wales and Northern Ireland, the CSCI registration types below have been used.

• *Care Home only.* These are homes that provide physical and emotional care to residents who are no longer able to be cared for in their own homes, but who do not need professional assistance on a 24-hour basis. Nursing support is provided by community nursing services.

• *Care Home with Nursing.* These are homes that provide 24-hour registered nursing services to residents who are very frail or have a medical condition or illness, and who need professional nursing assistance on a frequent and continuing basis.

• *Care Home not providing Medicine or Medical Treatment.* These are care homes where no medical or clinical intervention takes place. The service is based on the power of prayer.

The Care Homes database also includes independent hospitals accepting non-acute patients, which are classed as Hospitals. These are non-NHS hospitals that, in addition to acute medical/surgical or psychiatric patients, also accept non-acute patients such as those needing medium stay physical or psychiatric rehabilitation.

Establishments previously classed as 'Nursing Homes' or 'Dual Registered Homes' under the 1984 Registered Homes Act will usually be classed as 'Care Home with Nursing' under the Care Standards Act 2000. See Former Dual Registered Home for further information about dual registered homes and how to identify them.

Establishments previously classed as 'Residential Homes' under the 1984 Act will usually be classed as 'Care Home only', and establishments previously classed as 'Small Residential Homes' which would have accommodated fewer than 4 persons, are now also classed as 'Care Home only' or have been re-designated as 'Care Home providing Adult Placement'.

As information about adult placement homes is not in the public domain, these homes are not included on Care*Search.* For the same reason, children's homes are also not included.

Sheltered housing and supported living homes, which are not required to be registered with care standards agencies, are also not included on Care*Search*.

Respite Beds (Care Homes)

This field gives the number of dedicated beds in an establishment for respite or short stay care, which is where a person who is cared for at home stays in a care home for a short time to provide a break for their home carer.

This information is derived from responses to regular Laing & Buisson surveys. Only homes with current information will be returned in searches on the Respite Beds field.

Room Charges - see Daily Charge Maximum and Maximum (Hospitals), or Nursing Care Room Fee and Personal Care Room Fee (Care Homes)

Salutation - see Manager Salutation (Care Homes) and Owner Salutation (Care Homes)

Sector

Private means that the establishment or organisation is owned by a 'for-profit' operator, whether a public company, a private company, a partnership or an individual. In the case of care homes, some homes may be leased, but these are treated the same as owned.

Voluntary means owned or leased by a 'not-for-profit' operator. Many voluntary organisations operate their establishments through a trading company, and this may be indicated by Ltd in the name of the Owner or Group. The establishments concerned however still operate on a 'not-for-profit' basis, and are treated as voluntary.

Public sector establishments are classified as Local Authority or NHS owned. The Hospitals, Hospices and Clinics database does not include NHS establishments except for dedicated private patients units, or hospitals with pay beds that are included in an insurer network. These will be selected using the NHS sector.

An establishment may however be managed on a day-to-day basis by a different organisation to the one that owns it. For example, searching on the Local Authority sector will select establishments, which although owned by local authorities, may be managed by private sector operators.

Services & Facilities

Information on additional services and facilities at care homes is derived from responses to regular Laing & Buisson surveys.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide information on services and facilities. The information contained in the Services/Facilities field is the most recent available from Laing & Buisson surveys. Those homes with no current information on services and facilities will not be returned in searches on the Services/Facilities field.

As homes can provide a range of services and facilities i.e. there is a one to many relationship between a home and the different services and facilities the home offers, this field is not an exportable field in the downloading versions of Care*Search.*

Sheltered Housing Homes

As sheltered housing and supported living homes are not required to be registered with care standards agencies, these are not included on Care*Search*.

Single & Shared Rooms, with and without En-suite (Care Homes)

Information on the number of rooms of each type in a care home is derived from responses to regular Laing & Buisson surveys. The room types are:

- Single rooms with En-suite

- Single rooms without En-suite

- Single rooms (sum of the above two)

- Shared rooms with En-suite

- Shared rooms without En-suite

- Shared rooms (sum of the above two)

You can select homes with a specific number of rooms of each type, or homes within a range of room numbers. For example, if you want to find homes with given numbers of single en-suite rooms, you would select the 'Single rooms with en-suite' field in the Care Homes Search Form and enter your search criteria as follows:

20	Exactly 20 single en-suite rooms
>=20	More than or equal to 20 single en-suite rooms
>20	More than 20 single en-suite rooms
<>20	Number of single en-suite rooms not equal to 20
<20	Fewer than 20 single en-suite rooms
<=20	Fewer than or equal to 20 single en-suite rooms
20-30	Number of single en-suite rooms between 20 and 30

These may be combined with the additional operators ',' AND, and '|' OR
e.g. entering <20|>30 in 'Single en-suite rooms' returns homes with fewer than 20 or more than 30 single en-suite rooms, and entering >9,<11 returns homes with fees of exactly 10 single en-suite rooms.

Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes that respond provide information on room types. The information contained in the room type fields is the most recent available from Laing & Buisson surveys. Those homes with no current information on room types will not be returned in searches on room type fields.

Special Client Information (Care Homes)

This is a free text field that provides information about:

- more details about the particular client types for which care is provided

- the restrictions that apply to persons that can be admitted to the home

- the cultural or ethnic environment of the home that might make the home suitable for some people

Search terms are entered into this field, followed by clicking the Find button or Enter key. A popup window appears giving you the option to search for the term as an exact or partial word match.

Admission restrictions usually end in the word 'only'. So if you 'only' wanted to search for records with admission restrictions, you could search for the term. Expanding on this search, the terms 'Women only' would result in homes where admission is restricted to women.

Other criteria you might want to search for could include:

- admission restrictions based on lifestyle eg. 'non smokers', 'no alcoholics' and/or the word 'only'

- suitable environment or admission restrictions based on religious affiliation eg. 'Catholics only' or 'Christian ethos'

- admission restrictions based on client type eg. 'persons with physical disabilities as the result of polio only'. Whilst a home with this restriction could be expected to show Polio in Specialist Care field, this restriction is saying that only persons with this specific condition are admitted even though the client type is for 'persons with physical disabilities'

- admission restrictions based on age range (associated with the terms, 'over', 'under' or 'between'),

- suitable environment based on ethnicity eg. African-Caribbean (associated with the term 'suitable for')

- admission restrictions based on having been a member of a particular profession or trade; of having been an employee of a particular organisation; or having held a post in a church or in the armed services (associated with the terms 'dependants', 'employed', 'employees' 'members', 'pensioners', and 'only')

The contents of this field are derived from a variety of sources, including regular Laing & Buisson surveys. Not all care homes respond to our surveys every year, and not every response provides special client information. Homes without current special client information will not be returned in searches on this field.

The search term or terms used show are highlighted in **green** in the record detail of the care home records selected in the search.

Specialist Care (Care Homes)

These are specialised conditions or disabilities that require specialised care or intervention eg. specialised staff and treatments that would not normally be available in the majority of care homes. A care home can obviously provide specialist care for more than one condition.

Some conditions that were previously listed in the field in Care*Search* are now treated by care standards agencies as client types eg. addictive behaviour, dementia (and related conditions), sensory impairment, terminally ill, and have been withdrawn from this field. Users should use the appropriate client type in the Client Type field.

The contents of the specialist care field are derived from a variety of sources, including responses to regular Laing & Buisson surveys, and is the most recent available. Not all care homes respond to Laing & Buisson surveys in any one year, and not all care homes which respond provide any specialist care information. Those homes with no specialist care information will not be returned in searches on this field.

As homes can have provide specialist care for more than one condition i.e. there is a one to many relationship between a home and the different types of specialist care that the home can provide, this field is not an exportable field in the downloading versions of Care*Search.*

Supported Living Homes

As sheltered housing and supported living homes are not required to be registered with care standards agencies, these are not included on Care*Search*.

Telephone Number

The main, general enquiries number for the establishment or head office beginning with the full area code. The local number, if it consists of seven or eight digits, is split into groups of three or four digits**.**

Town

The town or city in which the establishment is located, or to which it is closest, is given in this field. For example, the Town field for an establishment at '21 St Ambrose Grove, Anfield, Liverpool, L4 2RL' would be 'Liverpool'.

The town is not necessarily the postal town, since this may not be the closest town to the establishment.

As the major metropolitan areas of London, Belfast, Bristol, Edinburgh, Glasgow and Manchester, are not assigned counties in the County field, the Town field can be used for selecting establishments in these cities. London is only used in the Town field however for establishments within the London Postal District. To select establishments in the Greater London area, the Region field should be used.

Unique Record Number

The unique record number is the permanent, unique identifier of each record on Laing & Buisson's care and health services database. The unique record number of a particular care home, hospital, hospice, clinic etc will not change from one edition of Care*Search* to the next,

unless the establishment is closed and subsequently re-opened as an entirely different type of establishment.

Website

This is the website of the establishment or organisation. The internet protocol prefix http:// is not included, except where the web site address does not include www. Where establishments such as care homes and hospitals are owned by groups, the website address shown may be that of the group.

Weekly Fees (Care Homes) - see Nursing Care Room Fee and Personal Care Room Fee

Region Map

Scotland

Northern Ireland &
Isle Of Man

North

Yorkshire &
Humberside

North West

East Midlands

Wales

West Midlands

East Anglia

Northern Home Counties

Greater London

South West

Southern Home Counties

County Map

Western Isles

Morayshire

Highland

Aberdeenshire

Shetland
Islands

Orkney
Islands

Angus

Perthshire

Dunbartonshire

Clackmannanshire

Stirlingshire

Fife

Falkirkshire

Argyll & Bute

West Lothian

Midlothian

East
Midlothian

G

E

Renfrewshire

Lanarkshire

Scottish Borders

Ayrshire

Cities not in
County Areas
B   Bristol
E   Edinburgh
G   Glasgow
L   London
M   Manchester

Dumfries & Galloway

Northumberland

Tyne & Wear

Northern Ireland
Counties
• County Antrim
• County Armagh
• County Down
• County Fermanagh
• County Londonderry
• County Tyrone

City not in County Area
• Belfast

Cumbria

County Durham

Isle of Man

North Yorkshire

East Riding of Yorkshire

Lancashire

West
Yorkshire

Greater
Manchester

M

South
Yorkshire

Lincolnshire

Merseyside

Anglesey

Cheshire

Derbyshire

Clwyd

Nottinghamshire

Gwynedd

Staffordshire

Rutland

Shropshire

Leicestershire

Norfolk

West
Midlands

Cambridgeshire

Ceredigion

Northampton
-shire

Suffolk

Worcester
-shire

Warwick
-shire

Powys

Bedfordshire

Monmouthshire

Hereford
-shire

Buckingham
shire

Hertford
-shire

Essex

Carmarthen-
shire

Gwent

Pembrokeshire

Gloucestershire

Middlesex

Oxfordshire

L

West Glamorgan

B

Mid Glamorgan

Berkshire

Surrey

South Glamorgan

Wiltshire

Kent

Hampshire

Somerset

West Sussex

East Sussex

Devon

Dorset

Isle of Wight

Cornwall

Isles of Scilly

Appendix 4

Technical Information & System Requirements

Development & System Requirements

Care*Search* has been developed using Borland Delphi software, and is designed for a Windows 32-bit operating system. It can be used on PCs running Windows 95, 98, 2000 and Windows XP, with the exception of the Windows XP Home edition.

A CD drive is required. CD drives that have been added to PCs since new i.e. not factory installed, may give rise to problems. The performance of CareSearch eg. the speed of retrieval of search results, the sorting of records, the display of reports, the exporting of records etc., will be affected by the speed of the processor and the amount of RAM installed on a PC.

Contents of CD

Care*Search* is supplied on a CD ROM, the contents of which are set at the production stage and cannot be altered ie. the files on the CD are read-only.

The Care*Search* CD contains approximately 200Mb of files, stored in Paradox tables. The Care*Search* program files are 10Mb, and the index files, which users can choose to install on their hard drive, are 17Mb. Network users, and single users who opt to install the data files on a local drive, will require a further 160Mb of free space.

Security & Installation

A password is required to install Care*Search*. Care*Search* is issued three times a year, and each issue of the CD expires after a grace period of 42 days from a first warning message being received.

Care*Search* requires that wherever the software is installed on a local drive, the user must be able to access that drive or that part of the drive where it is installed. This includes the Program Files directory where the BDE (Borland database engine) is installed by default. Where the IT environment restricts access to local drives, system administrators will need to change permissions to allow this.

Appendix 5

Licence Agreement

In order to protect the copyright on the Care*Search* CD, the data and the software, it is a requirement of supply that a licence agreement, which sets out the conditions of use of the CD, is signed by subscribers. A copy of the standard licence agreement between Laing & Buisson and subscribers is given below.

LAING & BUISSON

Care*Search* Licence Agreement

Licensor

Laing & Buisson Ltd 29 Angel Gate City Road London EC1V 2PT	('Laing & Buisson')

Licensee

XXXXX XXXXX XX XXXXXXXX XXXXXXXX XXXXXXXX XXX XXX	('Licensee')

Date of Licence: XX XXXXXXXX 2004   **Licence No:** XXX

LICENCE PERIOD & SUPPLY

The period of the Licence is a calendar year from the Date of the Licence, and Laing & Buisson agrees to supply the Licensee with the issue of the Product (Care*Search*) current at the time of subscription and to two subsequent issues up to **XX XXXXXXXX 2005**.

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On behalf of Laing & Buisson   **On behalf of Licensee**…..

Name   …………………………   Name   ………………………………………..

Signed   …………………………   Signed   …………………….…………….…

Position   …………………….…..   Position   ……………………………………….

Date   …………………….…..   Date   ……………………………………….

A signed copy of this Licence should be returned to Laing & Buisson at the above address or faxed to 020 7923 5349 or 020 7833 9129

Appendix 6

Troubleshooting

These notes can be used by Care*Search* users to identify the likely cause of faults, and the action to take. Where the fault cannot be fixed, you can seek help from the Care*Search* Help Desk on 020 7923 5395.

When reporting faults, it is helpful if the user faxes a screen print of any error message to the Care*Search* Help Desk on 020 7923 5349, and confirms the details of the fault in an email to data@laingbuisson.co.uk, saying exactly how you were using Care*Search* immediately before the fault occurred.

General Checks	
Is the Care*Search* CD in the CD caddy?	The CD needs to be in the CD drive during installation, and to remain the drive at all times for Care*Search* to work, unless the data files have been installed on a server or the user's hard drive.
If you have more than one CD drive, is the CD in the correct drive?	If you have more than one CD drive on your PC check that the CD is in the correct drive, as Care*Search* will only work on the CD drive on which it has been installed unless a different drive has been selected subsequently either on first loading, or by changing the CD Directory in the Preferences window. The default drive is usually D
Is the most recent issue of Care*Search* being used?	Earlier issues of the CD will have timed out and cannot be used. The month and year of issue is given on the CD. If a new issue has not been received, check with the Help Desk
Is the CD to be used on a stand-alone computer for single use, or on a server for networking?	The steps for installing the CD on a server are different from installing on a stand alone computer
Have you referred to the Care*Search* User Guide?	These troubleshooting notes are of course in the User Guide, but it is important to remember that these notes are here to refer to should anything go wrong when installing or using Care*Search*
Which Windows operating system is in use on the PC or network on which Care*Search* is being installed? eg. Windows 98, ME, 2000, XP, Vista or NT	Care*Search* does not run on Windows XP Home edition at the present time. Users can find out the operating system in use on their PC by going to the Start menu, selecting Settings, and then Control Panel, and then clicking on the System icon. The first tab, General, will state the operating system for the computer eg. Microsoft Windows 2000
Have all other applications on the PC been closed down?	The Care*Search* installation process cannot proceed whilst certain applications are still open, in particular those that use a Borland database engine (or BDE) Care*Search* is not known to conflict with any other applications whilst in use

Installation	
The CD appears to be read by the CD drive, but nothing happens	In Windows Explorer, select the CD in the CD drive. If an Incorrect Function error message appears *[drive]: \is not accessible*, where [drive] is the drive letter, there may be a fault on the CD. The user should inspect the CD for obvious faults.
Installation gets 'stuck' at the initial Checking Components stage	On some PCs this checking stage can take some time. If the time being taken seems excessive, cancel the install and start the install process again
The installation fails during the final Installing stage when the files are being successively downloaded Error message like: *An I/O error occurred when installing a file. This is normally caused by bad installation media or a corrupt installation file. Abort or Retry*	It is unlikely that the CD is faulty, so try to install the CD again. If this fails, uninstall the previous version of Care*Search* using the Add/Remove Programs facility in the Control Panel (this can be accessed via Start/Settings), and attempt to install the new issue again. If this fails, please contact the Help Desk who may send a replacement CD.
Error message that there is a Borland database engine conflict, or conflict with another application Error message like: *Conflicting application in memory. BDE is currently being used. Please close all applications using the BDE and restart the installation*	The Care*Search* installation process cannot proceed whilst applications that use the Borland Database Engine (or BDE) are still open. Close all open applications and re-start the installation process. This can also occur if the Install Care*Search* on the Launch screen is clicked more than once, perhaps because the installation screen takes a little time to appear, and two installation windows have opened, one hidden behind the other. This will prevent you from being able to complete the installation process. Close both windows and re-start the installation process.
Error message *pdoxusrs.lck file already exists*	This can arise when Care*Search* is being installed on a subsequent PC, whilst Care*Search* is still open on the original PC. Close the application on the first PC, and start the install process again.
Message that directory folders or files cannot be found	Care*Search* requires that wherever the software is installed on a local drive, the user must be able to access that drive or that part of the drive where it is installed. This includes the Program Files directory where the BDE (Borland database engine) is installed by default. Where the IT environment restricts access to local drives, system administrators will need to change permissions to allow this.
Error message like: *Network initialisation failed. File C:\PDOXUSRS.NET. Access violation at address 004ccb59, read of address 00972974*	This message can occur when using Windows XP, and is most likely due to access restrictions. Where the IT environment restricts access to local drives, system administrators will need to change permissions to allow this.
Installation takes long time	Once you are familiar with the stages of the installation, it should take more than a couple of

	minutes. If you download the data files onto a local drive then this will take a little longer.
	If the installation appears to take a long time this is likely due to insufficient disc space on your PC. If you have any other applications open, close them and try again, otherwise you should ask your IT person to look at your machine.
Opening Care*Search*	
Error message like: *Path not found* or *Network Initialisation Failed. Permission denied* or like: *Directory controlled by other .net file.* *Directory C:* *File Y:CareSearch\Data\ PDOXUSERS.LCK*	This message will occur when if during a network installation the NET DIR setting in the Start/Settings/Control Panel has been set on one or more machines to the wrong directory or to a non-accessible directory. Refer to Network Installation, paragraph (d) PC Settings, which is in the Installing CareSearch section at the beginning of this guide
On trying to run Care*Search* eg. clicking on the desktop icon Message saying *Cannot access directory* or *Not exact read/write*	Whilst a single user can access the single version of Care*Search* over a network, this message will occur if a second user tries to open a non-networked version of CareSearch on a server whilst it is in use by another user

On trying to run Care*Search* eg. clicking on the desktop icon
 	
Error message like:
 	
Fatal registry error (CE0819042006)
 	
or
 	
Fatal registry error (XP3107200400 05102005)
 	
and then
 	
Please contact the CareSearch help desk
	These messages occur:
	
	(a) when an earlier issue of the CD, which has expired, is being used. The *'CE'* and *'XP'* in the error message stands for Certificate Expiry, and the numbers after the first two digits are the current date.
	
	    The user should check that an old issue of the CD is not being used by mistake. The month and year of issue is given on the label on the CD, or
	
	(b) when during installation the new security certificates that Care*Search* needs to run, have not loaded into the registry of the user's computer.
	
	    This could be due to certificates not being overwritten during installation, which is what should happen, possibly because the registry settings on the user's PC are protected to prevent their being changed.
	
	If you are a current subscriber and are using the current CD, please contact the Help Desk.
	
	(1) the Help Desk may send you a fix that will reset the registry settings
	
	(2) the Help Desk may advise you to ask your system administrator or IT person to grant the CD access to the registry to allow the security certificates to be updated.
	
	(3) the Help Desk may advise you to uninstall CareSearch completely and then reinstall the CD. To do this:

	• go to Start/Settings/Control Panel/Add-Remove Programs • select CareSearch CD Version 2 from the list of currently installed programs • click on Remove • when successful removal has been confirmed, re-install CareSearch in the usual way
On trying to run CareSearch eg. clicking on the desktop icon Error message like: *Directory is use. PDOXUSERS.LCK*	This message can occur where the data files on CareSearch have been downloaded to a local drive or server, and when the locking files (which are normally only created when CareSearch is opened, and are removed when CareSearch is closed), did not disappear automatically when CareSearch was previously closed. With CareSearch closed, you should locate the locking files PDOXUSRS.LCK and PARADOX.LCK, and delete them if they are still there. These files are stored in the same location as the data files downloaded at the time of installation. If the problem persists, please contact the Care*Search* Help Desk

On trying to run Care*Search* eg. clicking on the desktop icon
 	
Error message like:
 	
Network initialisation failed. Permission denied. File: C:\PDOXUSER.NET. Directory: C drive
	This message can occur where the data files on CareSearch have been downloaded to a local drive or server, and where the locking files (see error message above) cannot be created because the C drive or other drive is read-only. This can be overcome either:
	
	(a) by selecting an alternative drive if one is available:
	
	   (i) go to Start on the Taskbar, select Settings, then Control Panel, and then BDE Administrator
	
	   (ii) in the left hand pane of the BDE Administrator, select in succession Configuration, Drivers, Native, and then Paradox. Then in the right hand pane, set the NET DIR path to an alternative hard drive eg. D:\
	
	(b) or your system administrator should allow you full control over certain folders and files ie. C:\Program Files\Laing & Buisson\CareSrch or C:\Windows\CareSrch, and or C:\PDOXUSRS.NET, and the CareSearch program files
	
	If the problem persists, please contact the Care*Search* Help Desk

	This message can also occur when a file, PDOXUSRS.NET, does not disappear automatically when CareSearch was previously closed.

	You will need to locate this file, and delete it. This file is stored wherever the network directory has been set in the BDE Administrator. (a) close CareSearch, and go to Start on the Taskbar, select Settings, then Control Panel, and then BDE Administrator (b) in the left hand pane of the BDE Administrator, select in succession Configuration, Drivers, Native, and then Paradox. In the right hand pane, there is a row called NET DIR and the location of the PDOXUSRS.NET file is given to the right. Make a note of this location (c) use My Computer or Windows Explorer to find this file and then delete it If the problem persists, please contact the Care*Search* Help Desk
On trying to run Care*Search* eg. clicking on the desktop icon Message *CD not found*	(a) Is the Care*Search* CD still in the drive? The CD needs to remain in the CD drive after installation for Care*Search* to work (unless the data files have been installed on a server or the user's hard drive) (b) Some stand-alone users will have more that one CD drive on their machine. Check that the CD is in the correct drive. Care*Search* will only work on the CD drive on which it has been installed unless a different drive has been selected subsequently either on first loading, or by changing the CD Directory in the Preferences window. The default drive is usually D
On trying to run Care*Search* eg. clicking on the desktop icon Message *Place CD in drive* when the correct drive has been selected, and the CD is in the drive	This message occurs when Care*Search* cannot find a file on the CD, which is used to check that the CD is there. You should seek advice from the Care*Search* Help Desk, but before doing so, you should check for this file as follows: (1) open Windows Explorer, and locate the CD drive where the Care*Search* CD is. It should be called 'csrchmay05' or similar. If the CD does not have this name, then the wrong Care*Search* CD is in the drive (2) click on the CD drive, and in the right hand pane should be a folder called CSrch (3) double click on the CSrch folder, and then double click on the folder within it called Data (4) in the Data folder, scroll down the files and check that a file called Fields2.db is there. If this file is there, then there is possibly a conflict between the CD and the operating system on your PC, and you should seek advice from the Care*Search* Help Desk

On trying to run Care*Search* eg. clicking on the desktop icon Message *This CD will expire in XX days*	This is a standard message to notify users that the current issue will expire. The next issue of Care*Search* will be despatched to customers before the expiry date.
On trying to run Care*Search* eg. clicking on the desktop icon Error message like *'Illegal Operation'* or *'Caresearch has caused an error'* and then '*Runtime Error 21600408BAD*'	This affects Windows 95, 98 and ME users and is due to a conflict with a fix for the BDE (Borland Database Engine) for Windows NT, 2000, and XP users. This fault was corrected in the July 2006 issue
On trying to run Care*Search* eg. clicking on the desktop icon, CareSearch takes a long time to open.	CareSearch should take no more than 15 seconds to open. Any delay is likely due to insufficient RAM or disc space on your PC. Close all other applications and try again, and if this does not help, you should ask your IT person to look at your machine.
Using Care*Search*	
Home Screen On selecting one of the databases after installation, the error message *Index files out of date. Please re-install the CareSearch CD* appears	This is due to the index files not having been loaded from the CD. The user should go through the installation process again, and check the Install Index Files box
Home Screen On selecting one of the databases after installation, an error message appears: *[name of database] not available. Network initialisation failed.* *Permission denied* *File: C:\PDOXUSER.NET* *Directory: C drive.*	See similar error message in Opening CareSearch section above
Home Screen On selecting one of the databases after installation, an error message appears: *[Name of database] Insufficient disk space.*	This affects Windows NT, 2000, and XP users and is due to a known BDE (Borland Database Engine) fault where there is over 4Gb of free space on the hard drive. This fault was corrected in the April 2006 issue
Home Screen The Options screen is blank i.e. it is not displaying the list of databases The Index screen is blank i.e. the list of values available for a field do not display The Summary List is blank i.e. the results of a search are not displayed	Exit Care*Search* and then open it again
Search Form When searching a database, the search takes a long time.	The time taken to complete a search generally reflects the complexity of the search, but straightforward searches should take no more than 15 seconds. If searches take longer than this, it is likely due to insufficient RAM or disc space on your PC. Close all other applications and try again, and if this does not help, you should ask your IT person to look at your

	machine.
Search Form When searching a database, an error message appears like: *Permission denied. File d:_qsq52.db*	This error message occurs when the temporary tables that are produced by a search cannot be written to a particular location, most likely because there are access restrictions to this location. By default this location is the same as the destination location for the CareSearch software which is C:\Program Files\Laing & Buisson\CareSrch, but an alternative location may have been chosen on installation or the box may be blank. To check this location, go to Settings | Preferences | Options in the Menu bar of CareSearch. The Private Directory box shows the location of the folder which is not allowing these temporary files to be stored. This problem may only arise occasionally, and can be overcome by exiting CareSearch and then opening it again. If however it persists, you should (1) ask your IT person for help or (2) reset the Private Directory location to C:\Program Files\Laing & Buisson\CareSrch or (3) create a new folder C:\Temp on the C drive and then set the Private Directory to this location.
Search Form After using the Reset button to restore the default search fields, the some or all of the search fields are blank i.e. they have no names	This was caused by an intermittent bug in the software programme which has now been eliminated. Click on the Home page icon and select a different database from the one you are currently using. Then select the Home page again and return to the database you were previously using. This will reactivate the default search field settings.
Search Form or Exporting Records When exporting records, the export stops after a short time and there is an error message such as: *Unknown internal operating system error* *Table: D:\CARESRCH\DATA\XXXXXX.DB* where XXXXXX is the name of a database table eg. CONTACTS	This error message is likely to be caused by one of the database tables on the CD being corrupted, and should be reported to the Care*Search* Help Desk who will send a replacement CD.
Exporting Records Error Message *I/O error 103* when trying to export records	This is a 'File not open' error which may be due to there being no space on the drive to which the records are being exported, the drive is write protected, unformatted or faulty. Typically this could be a floppy disk, and the user should first check that the disk is not full, and that it has been formatted. The user should also check that files can still be exported to their local hard drive to eliminate the export programme as the source of the fault. This message can also occur if the destination

	file i.e. the file to which the records are being exported is still open or is in use
Exported Records #1 The number of records in the file of exported records is less than the number of records in the search results/summary list	This can occur for two reasons, the 2nd of which occurs more commonly with care home records, is explained in the next section. The 1st reason is that the exported files are being saved to a different location than you had been using previously, and because you may be using the same names for the exported files, you are actually looking at old files with realising this. When installing CareSearch, the 2nd window that appears after you have entered the password is the Destination Location window. This is where the location is set for where the Care*Search* software will be installed. By default this is C:\Program Files\Laing & Buisson\CareSrch. This is also the default location of the Userdata folder to which searches, stored lists, and exported data files are saved. As a result, if you change this location during installation, or if you previously used a different location, any new files of exported records will not be in the same place as the record files that you previously exported. You should therefore locate the folder to which the files are now being exported, and this is either the default location as above or a different location that you have chosen.
Exported Records #2 The number of records in the file of exported records is less than the number of records in the search results/summary list	The 2nd reason for less records being exported than expected is because some records may not contain the contact type that you have selected in your export format. If you then tick the Exclude Record box in the Records with No Named Manager window, the records where there are no such named contacts will be excluded from the export (a) when exporting from the Care Homes database, this will also happen if you tick the Exclude Record box in the Records for Homes Owned by Companies & Other Organisation window as many care homes are owned by a group rather than by named individual proprietors (b) when exporting records from the other databases (and this applies only to users with the Complete version of CareSearch), if you have selected only a few contact types in the export format, and then tick the Exclude Record box in the Records with No Named Manager window, the records that are exported will exclude those establishments or groups which do not have any of these types of contact In all these cases, whilst the number of records given in the status bar at the bottom of the

	Export window during the export is the number of records in the summary list, the number of records that are actually exported will display on completion of the record export in the left had side of the status bar e.g. '83 records exported'
Error messages like: *Access violation at address 005F4A26 in module CareSrch.exe. Read of address 0000002* or *tbEstablishments_:Field'CLIENT_DESC' not found*	These error messages are generally caused by a fault in the software programme, and should be reported to the Care*Search* Help Desk. Such faults will be investigated and a fix included in the next issue of Care*Search*, or where the fault is significant a software update of the CD will be issued
Error messages like: *Access Denied! Files in use'*	This message may be displayed when CareSearch crashes unexpectedly for some reason whilst it is use. Before CareSearch can be restarted, the two lock files, PARADOX.LCK and PDOXUSRS.LCK, which are created in the same location as where the data files were downloaded at the time of installation, should be deleted.

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